



Application Preliminary Evaluation Packet

For each section, please rate the response then explain your rating by specifying strengths and weaknesses in the space provided. Where applicable, you should elaborate on concerns by specifying additional information you would request or follow-up questions that you have.

- § Pass: The response demonstrates an understanding of key issues and the ability to start a charter school successfully although minimal clarification may be needed in places. It addresses the topic with clear, specific and accurate information that reflects thorough preparation. The application meets minimum components as evidenced by the check boxes of the rubric.
- § Fail: The response either fails to entirely address the selection criteria or addresses some of the criteria. The responses lack adequate detail and/or raise substantial concerns about the applicant's preparation for and ability to start or operate a charter school successfully. The application fails to address all of the minimum components as evidenced by the check boxes of the rubric.

Subcommittee Members:

Deanna Townsend-Smith
Cande Honeycutt-Killian
Kevin Piacenza
Phyllis Gibbs
Glenn Allen
Avril Smart
Robert McOuat
Tracy Kelley
Steven Walker
Tracy Kelley
Tammi Sutton
Sherry Reeves
Buffy Fowler
Anthony Helton

Date of Review:

09/30/2016



NORTH CAROLINA CHARTER SCHOOL APPLICATION

Eldred Montessori Secondary School

Public charter schools opening the fall of 2018

Due by 5:00 pm, September 19, 2016

North Carolina Department of Public Instruction
NCDPI/Office of Charter Schools
301 N. Wilmington Street
Raleigh NC 27601-2825
919-807-3491

Mailing Address:
6303 Mail Service Center
Raleigh, NC 27699-6303

CHARTER SCHOOL
2016 Application Process
To open a charter school in the 2018-2019 school year

APPLICATION DUE DATE/TIME

September 19, 2016 A complete *online* application package, in the Office of Charter Schools **by 5:00 pm EST.**

Non-Refundable \$1000 Application fee due to the Office of Charter Schools

Application Fee Payment Details can be found on the Office of Charter Schools Website

APPLICATION SPECIFICATIONS

Applicants can submit applications prior to the deadline September 19, 2016 at 5:00 pm EST. **All applications must be submitted using the online portal** and applicants are to use the following specifications:

1. All required Appendices should be clearly titled, include page numbers (i.e. Appendix A and page numbers as- A1, A2, B1...), and submitted in the appropriate places within the application.
2. **Any** answer given within the application which is not original to the applicant, the applicant must provide a citation to the source of the answer.
3. Review all elements of your application for completeness before submitting.
4. **Any** document attached to the application or within the online system **must be** in PDF format.
5. Late submissions **will not** be accepted. No exceptions.

TABLE OF CONTENTS

I.	<u>APPLICATION CONTACT INFORMATION</u>	<u>6</u>
	Grade Levels Served and Total Student Enrollment:	7
	Concerns and Additional Questions	9
II.	<u>MISSION and PURPOSES</u>	<u>10</u>
	Mission:	10
	Educational need and Targeted Student Population of the Proposed Charter School:	10
	Purposes of the Proposed Charter School:	11
	Goals for the Proposed Charter School:	12
	Concerns and Additional Questions	15
III.	<u>EDUCATION PLAN</u>	<u>17</u>
	Instructional Program:	17
	Curriculum and Instructional Design:	18
	Special Programs and "At-Risk" Students	20
	Exceptional Children	22
	Student Performance Standards	24
	Student Conduct:	25
	Concerns and Additional Questions	27
IV.	<u>GOVERNANCE and CAPACITY</u>	<u>30</u>
	Governance:	30
	Governance and Organizational Structure of Private Non-Profit Organization:	30
	Proposed Management Organization (Educational Management Organization or Charter Management Organization)	35
	Private School Conversions:	35
	Projected Staff:	35
	Staffing Plans, Hiring, and Management	35
	Staff Evaluation and Professional Development	38
	Enrollment and Marketing:	40
	Marketing Plan	40
	Parent and Community Involvement	42
	Admissions Policy	43
	Weighted Lottery	44
	<u>PROJECTED ENROLLMENT</u>	<u>47</u>
	Concerns and Additional Questions	48
V.	<u>OPERATIONS</u>	<u>50</u>
	Transportation Plan:	50
	School Lunch Plan:	50
	Civil Liability and Insurance	51
	Health and Safety Requirements:	51
	Facility:	51
	Facility Contingency Plan:	53
	Concerns and Additional Questions	53
VI.	<u>FINANCIAL PLAN</u>	<u>55</u>
	Budget: Revenue Projections from each LEA 2018-19	55
	Total Budget: Revenue Projections 2018-19 through 2022-2023	56
	Personnel Budget: Expenditure Projections 2018-19 through 2022-2023	57
	Operations Budget: Expenditure Projections	60
	Overall Budget:	62
	Budget Narrative:	62

Eldred Montessori Secondary School - Eldred Montessori provides authentic learning experiences for passionate young adults so they can flourish in post-secondary education.

<u>Financial Compliance:</u>	<u>65</u>
<u>Concerns and Additional Questions</u>	<u>66</u>
<u>VII.</u>	
<u>AGREEMENT PAGE</u>	
<u>Application Fee:</u>	<u>68</u>
<u>Applicant Signature:</u>	<u>68</u>
<u>Total External Evaluator Votes</u>	<u>70</u>
<u>Total Subcommittee Votes</u>	<u>70</u>
<u>CSAB Votes</u>	<u>70</u>
<u>Initial Screening</u>	<u>70</u>
<u>External Evaluator</u>	<u>71</u>
<u>Charter School Advisory Board Subcommittee</u>	<u>82</u>
<u>Overall Summary</u>	<u>82</u>

I. APPLICATION CONTACT INFORMATION

Name of proposed charter school: Eldred Montessori Secondary School

Has the organization applied for 501(c)(3) non-profit status: Yes No

Name of non-profit organization under which charter will be organized or operated: *Eldred Montessori Secondary School*

Provide the name of the person who will serve as the primary contact for this Application. The primary contact should serve as the contact for follow-up, interviews, and notices regarding this Application.

Name of contact person: *Laine Staton*

Title/Relationship to nonprofit: *originator*

Mailing address: 2208 Collier dr
Durham NC 27707

Primary telephone: 919-883-7662 Alternative telephone: 919-423-7841

E-Mail address: *lainemstaton@gmail.com*

Name of county and local education agency (LEA) in which charter school will reside:

County: DURHAM

LEA: 320-Durham Public Schools

Was this application prepared with the assistance of a third party person or group?

No:

Yes:

Is this application a Conversion from a traditional public school or private school?

No:

Yes:

Is this application being submitted as a replication of a current charter school model?

No:

Yes:

Eldred Montessori Secondary School - Eldred Montessori provides authentic learning experiences for passionate young adults so they can flourish in post-secondary education.

Acceleration

Yes:

No:

To be considered for acceleration applicants must meet four specific criteria. Provide supporting evidences of the following:

**Demonstrate a clear and compelling need for the accelerated planning year*

Partner with a two of four year institution of higher education in North Carolina

*Attach Appendix A from the four year institution of higher education in NC to demonstrate a partnership
Verify the absence of a charter school in the proposed county of location*

Yes:

No:

Agree to participate in the planning year while the charter application is being reviewed without any guarantee of charter award.

Yes:

No:

What is the name of the nonprofit organization that governs this charter school? Eldred Montessori Secondary School

Is this application for Virtual charter school: Yes: No:

Grade Levels Served and Total Student Enrollment:

Projected School Opening: Year 2018 Month August

Will this school operate on a year round schedule?

No:

Yes:

Proposed Grade Levels Served and Total Student Enrollment (5

Years)

Academic School Year	Grade Levels	Total Projected Student Enrollment
First Year	09	100
Second Year	09,10	200
Third Year	09,10,11	300
Fourth Year	09,10,11,12	400
Fifth Year	09,10,11,12	400

The State Board of Education provides funds to charter schools, approves the original members of the boards of directors of the charter schools, has the authority to grant, supervise, and revoke charters, and demands full accountability from charter schools for school finances and student performance.

I certify that I have the authority to submit this application, that the initial board members and I were regularly involved in the development of this application, and that no part of this application is plagiarized. All information contained herein is complete and accurate. I realize that any misrepresentation will result in disqualification from the application process or revocation after award. I understand that incomplete applications will not be considered. The person named as the contact person for the application is so authorized to serve as the primary contact for this application on behalf of the non-profit organization.

lainestaton
Signature

Laine Marie Staton
Title

lainestaton
Printed Name

09/19/2016
Date

Section I: Application Contact Information Concerns and Additional Questions	<u>Reviewer</u>	<u>Page Reference</u>
<u>Starting a school, especially a high school with 100 students is particularly challenging. In addition, if there are not enough students, the school risks financial viability, program integrity and the maximum statutory enrollment is 80. Only 35 of 89 families surveyed indicated interest.</u>	<u>Cande Honeycutt-Killian</u>	<u>Grade Levels</u>
<u>The numbers for a high school are very, very low.</u>	<u>Anthony Helton</u>	<u>Grade Levels</u>

<u>Reviewer</u>	<u>Score</u>
<u>Deanna Townsend-Smith</u>	
<u>Cande Honeycutt-Killian</u>	<u>Pass</u>
<u>Kevin Piacenza</u>	<u>Pass</u>
<u>Phyllis Gibbs</u>	
<u>Glenn Allen</u>	
<u>Avril Smart</u>	
<u>Robert McQuat</u>	
<u>Tracy Kelley</u>	
<u>Steven Walker</u>	<u>Pass</u>
<u>Tracy Kelley</u>	<u>Pass</u>
<u>Tammi Sutton</u>	
<u>Sherry Reeves</u>	<u>Pass</u>
<u>Buffy Fowler</u>	<u>Pass</u>
<u>Anthony Helton</u>	<u>Pass</u>

II. MISSION and PURPOSES

(No more than three total pages in this section)

Mission:

*State the Mission of the proposed charter school in **thirty-five words or less**. The mission statement defines the organization's purpose and primary objectives, describing why it exists. The mission statement provides the foundation for the entire proposal.*

The mission statement of the proposed charter school is as follows:

Eldred Montessori provides authentic learning experiences for passionate young adults so they can flourish in post-secondary education.

Clearly describe the mission of the proposed charter school:

Eldred Montessori students are taught through a holistic approach. A trained Montessori teacher crafts engaging and thought-provoking units of instruction that allow students to learn both the outlined curriculum as well as about themselves and the impact they can make on society.

Educational need and Targeted Student Population of the Proposed Charter School:

- 1. Provide a description of Targeted Population in terms of demographics. In your description, include how this population will reflect the racial and ethnic composition of the school system in which it is located. Describe the rationale for selecting the location and student body.*

Eldred Montessori's target population is students in grades 9-12 from Durham, NC who are interested in a holistic approach to secondary education. It is our goal to target a mix of races and ethnicities to reflect the population of Durham.

Durham Public Schools already has a thriving Montessori population. There are two public Montessori elementary schools in Durham: Morehead Montessori Elementary School and George Watts Elementary School. In addition there is one public Montessori middle school, Lakewood Montessori Middle School. These public schools have a mix of races, incomes, and ability levels, mirroring the population of Durham. It is our goal to continue with this trend, offering secondary Montessori education to a diverse population of students.

- 2. What will be the total projected enrollment at the charter school and what percentage of the Average Daily Membership (ADM) does that reflect when compared to the Local Education Agency (LEA) of the same offered grade levels? (i.e. If the proposed school will be grades 9-12, only compare the total enrollment to the total enrollment of the LEA is grades 9-12).*

Eldred Montessori's projected total enrollment is 400 students. When we first open, only grades 9 will be offered with a first year enrollment of 100 students. We will continue to add grade levels as students matriculate through, each year adding 100 more students. It will take the school four years to reach full enrollment, serving students in grades 9-12.

Eldred Montessori Secondary School - Eldred Montessori provides authentic learning experiences for passionate young adults so they can flourish in post-secondary education.

During the 2015-2016 school year the Average Daily Membership (ADM) of grades 9-12 in DPS was 10,396 students. We would pull a 390 student population, which is 4% of the total population. Our opening year we will enroll 90 students from Durham Public Schools which is 3% of the 3197 ninth grade students from Durham Public Schools.

We also plan on pulling 10% of our population from Orange County. We predict ten students from each class will come from this county. There are currently 678 students in Orange County, so we would be pulling 1% from their population. There are 2482 students total in the ninth through twelfth grade, so we will be pulling around 1.6% of their population from our school.

3. *Explain how the charter school's education plan will compare to or differ from that of the local LEA(s).*

Durham Public School's data from the 2015 school year is staggeringly low. Their graduation rate on average is 80%, but when you break down the graduation rates you see that there is a split between the success of white students to other students in the system. White students have a graduation rate of 90% whereas black student's graduation rate is at 79.6% and hispanic students are at 72.2%. To look further at graduation rates, students who are economically disadvantaged graduate at a rate of 76.4% and those who have limited English proficiency (LEP) graduate at 46.9%. This is difficult information to consider, especially considering the the state's graduation rate is at 85%.

Numbers do not look better when you look at how students in Durham Public Schools perform in assessed courses. In general, 37% of students who are College and Career Ready are passing their End of Course assessments, compared to the 47.9% state average. In every category of assessment including English I, Biology, Math I, and ACT proficiency, student's score at least 10% lower that the state average. This discrepancy and low achievement rate has led us to apply for a charter school, so we can create a place for students to become immersed in their learning and experience a higher rate of success.

Eldred Montessori Secondary School will be the first secondary Montessori school in Durham, NC. We will offer a standard curriculum to students so they are college ready when they graduate from our school. Their senior year they will have the opportunity to take classes with Durham Technical Community College so that they can earn college credit for free. The unique part of our school will be in how students take electives. A large block of time each day will be devoted to working in the community around our school. Students will work in our community garden or complete internships at local non-profit businesses in the area. By using this time creatively we will expose our students to authentic learning experiences and teach them how to make a positive change in their community.

4. *In the appendices (Appendix A1), you must provide evidence through a narrative or visual of this educational need through survey data, or times and locations of public meetings discussing this proposed charter school. (Please do not provide more than one sample survey form).*

Purposes of the Proposed Charter School: *In one page or less, describe how the proposed charter*

Eldred Montessori Secondary School - Eldred Montessori provides authentic learning experiences for passionate young adults so they can flourish in post-secondary education.

school will achieve one or more of the six legislated purposes, as specifically addressed in the NC charter school statute GS 115C-238.29A, and the proposed school's operations.

The Six Legislative Purposes of a Charter School are:

- 1. Create new professional opportunities for teachers, including the opportunities to be responsible for the learning program at the school site.*
- 2. Hold schools accountable for meeting measurable student achievement results.*
- 3. Provide parents and students with expanded choices in the types of educational opportunities that are available within the public school system.*
- 4. Improving student learning.*
- 5. Increasing learning opportunities for all students, with a special emphasis on at-risk or gifted students.*
- 6. Encourage the use of different and innovative teaching methods.*

1. Teachers hired at Eldred Montessori will be required to earn a secondary Montessori certification through an American Montessori Society approved institution. It is unique to be able to offer this certification. Earning this certification requires over two years of graduate-level work. By requiring all teachers to earn this certification, the quality of instruction and learning that happens in the school will improve and will allow all teacher to speak a common educational language. A teacher that is Montessori trained turns in to a master educator. We want to provide these learning experiences for the educators willing to commit to our school.

3. Eldred Montessori looks to provide the residents of Durham with a secondary Montessori option when they consider which high school to attend. Currently there are several magnet school options within Durham Public Schools. Currently, each school specializes in the types of classes offered and not in a teaching and learning philosophy. Eldred Montessori will concentrate on how to develop responsible and competent learners, which is unique to other secondary alternative offerings.

6. Students at Eldred Montessori will have a different learning environment as compared to their peers in traditional and magnet high schools. Students will participate in cross-curricular projects through out their school career, integrating subject-areas and building on skills learned in every class. They will be grouped with different ages to benefit from learning from one another and allowing for leadership opportunities.

Goals for the Proposed Charter School:

- 1. Provide specific and measurable **goals** for the proposed school for the first 5 years of operation outlining expectations for the proposed school's operations, academics, finance, and governance. Address how often, who, and when the information will be communicated to the governing board and other stakeholders.*

Goal 1: At the end of five years, Eldred Montessori will score higher than the state on specific measures of achievement including Math I, English II,

Eldred Montessori Secondary School - Eldred Montessori provides authentic learning experiences for passionate young adults so they can flourish in post-secondary education.

and ACT scores. The board will review data at the end of each academic year. Currently, the state's scores are as follows:

Math I: 49%
English II: 50%
ACT Proficiency: 49%

These numbers give Eldred Montessori a baseline for what our achievement needs to be, but are considerably lower than the larger high schools in Durham. To stay competitive with these schools we will aim to score at least 60% on our scores so as to stay competitive with our local school.

Goal 2: Our school will have three months of surplus in our budget at the end of four years. The school's financial committee will monitor expenses and income quarterly, ensuring there is a surplus at the end of each fiscal year. The expectation for the school's beginning years is that we will only have a small surplus each year, as the most vital initial work of the school is being established. As the school grows and becomes more financial sound the surplus should grow so that by the end of the four years there is at least three months of surplus in the budget.

Goal 3: Our third goal is to transition from a starting board to a governing board within five years of the school's opening. The starting board will consist of members who were involved in the application, planning, and opening of Eldred Montessori. New members are members who have been added to the board after the initial opening. Governing members are those who are most recently elected to the board. These will not be the starting members of the board unless they are voted in for a second term. The transition from starting board to governing board will be as follows:

Year 1: The board will be staffed with 100% starting board members.

Year 2: The board will be staffed with 100% starting board members.

Year 3: The board will be staffed with 66% starting board members and 33% new board members.

Year 4: The board will be staffed with 33% starting board members, 33% governing board members, and 33% new board members.

Year 5: The board will be staffed with 66% governing board members and 33% new board members.

Board members will be nominated at the end of each school year starting in year three.

2. How will the governing board know that the proposed public charter school is working toward attaining their mission statement?

Goal 1: For students to be prepared for post-secondary education, they need to be successful in the Future-Ready Core curriculum. By monitoring the academic achievements in Goal One, we will ensure our students are succeeding in the necessary curriculum to be prepared for college.

Goal 2: One of the biggest challenges of opening a charter school is managing and maintaining finances as the school builds. Many times schools go under due to faulty money management. To ensure that students have authentic experiences, we plan to slowly build a surplus so we can stay open well into the future.

Goal 3: Maintaining a strong leadership on the governing board is vital to creating a sustainable charter school with a clear vision. This can be difficult, as the starting board may have difficulty transitioning it's focus and leadership as the needs of the school change. We have designed a clear outline for how the governing board will make this transition. Clear leadership will allow Eldred Montessori sustain its vision, allowing us to provide an authentic Montessori environment for our students.

Section II: Mission and Purposes Concerns and Additional Questions	Reviewer	Page Reference
Can the mission statement be revised to strengthen the school's academic rigor beyond "authentic learning experiences"?	Kevin Piacenza	Mission Stat
Attached for review purposes is a map outlining the current charter schools. Additionally, the map provides an overview of the general placement of proposed charter schools for the 2018 school year: http://www.dpi.state.nc.us/charterschools/schools/map .	Deanna Townsend-Smith	Educational
What are the demographics of the students in the other Montessori schools in Durham?	Buffy Fowler	Educational
Small number of respondents to survey. Can school enroll 100 ninth graders in year 1?	Sherry Reeves	Educational
Applicant should be asked whether the other 3 Montessori ES and MS are charters, private schools. The rationale for the school, as presented, is not compelling and does not sufficiently speak to whether there is researched-based evidence that a Montessori HS will adequately meet the needs of students who have not come from a Montessori MS or ES. Is there a school with similar student populations that has been successful in another state? The applicant team provides substantially no evidence supporting this school model. The link for surveys was broken. Does applicant intend to make its target population students from Montessori MS or will it recruit from other middles schools within the LEA?	Tracy Kelley	Educational
Do the survey results (35 out 89 requesting more information) demonstrate need for a Montessori high school in the target location? Can the applicant cite evidence beyond Appendix A1 that a Montessori high school program would be an attractive alternative for students with low academic achievement history? How will the proposed program's unique qualities produce different outcomes for the target population?	Kevin Piacenza	Educational
Do you have additional evidence of educational need beyond the surveys? 35 of 89 responses indicated interest. This is not sufficient evidence for a school with already low projected enrollment numbers. Applicant needs to provide further clarification on how a Montessori high school would meet the needs of the students in Durham County. Are the currently operating Montessori schools public, private or charter? What research backs up the efficacy of the Montessori model for high school students?	Cande Honeycutt-Killian	Educational
It seems to me that the surveys show insufficient evidence for the school. I'd like to here why they think the interest is there.	Anthony Helton	Purposes of
Applicant needs to expand upon how this model will improve student outcomes.	Cande Honeycutt-Killian	Purposes of
There is no particular focus on improving student outcomes despite having chosen 3 purposes. While applicant speaks about different learning environments it does not make the connection from different to better, especially with regard to serving at risk students.	Tracy Kelley	Purposes of
"Eldred Montessori will concentrate on how to develop responsible and competent learners, which is unique to other secondary alternative offerings"- Can the applicant clarify this statement? Are you saying this is not happening at any schools in the LEA?	Kevin Piacenza	Purposes of
Higher goals seem to be needed.	Anthony Helton	Goals for th
Academic goals does not address the current scores of Durham County students (that would be a baseline). It is unclear if the goal is to surpass state average or to score at least 60%. What is the goal and what existing evidence supports that this goal is attainable? What formative assessments will be used during the academic year to ensure the school is progressing?	Cande Honeycutt-Killian	Goals for th

It is unclear how a transitioning board will ensure financial viability.		
Goals seem a little low to me.	Steven Walker	Goals for th
While school aims to out perform the state goals, the proposed goal of 60% does not evidence high expectations for student learning or teaching. Academic goals are not time bound and are not projected 5 years. Applicant doe snot identify interim or benchmark assessment that it will use to progress monitor toward state proficiency, additionally there are not operations goals that are aligned with mission to track internships, portfolio demonstrations of learning, teacher retention rates, student retention rate, parent satisfaction, or Montessori specific indicators or standards etc. Future ready goals to not identify a metric and Goal 3 under leadership is not SMART at all. There are no metrics or structures, or process for how the Board will monitor the schools progress because the methods are incomplete and lacking adequate metrics or measures.	Tracy Kelley	Goals for th
Goal 3 explanation of transitioning board from start board to a governing board is confusing. What is the targeted population? Current middle-school Montessori students in Durham? Academic goals are not lofty. Will school be able to attract and retain teachers if a 2-year graduate program is required?	Sherry Reeves	Goals for th
Is Goal 1 to score higher than state after 5 years or score higher than 60%? Can the applicant clarify the academic goal so that it more specific with respect to time, growth, and outcomes?	Kevin Piacenza	Goals for th

Reviewer	Score
Phyllis Gibbs	
Tracy Kelley	
Anthony Helton	Fail
Steven Walker	Pass
Glenn Allen	
Tracy Kelley	Fail
Deanna Townsend-Smith	
Tammi Sutton	
Avril Smart	
Sherry Reeves	Fail
Cande Honeycutt-Killian	Fail
Buffy Fowler	Pass
Robert McOuat	
Kevin Piacenza	Pass

III. EDUCATION PLAN

(No more than ten total pages in this section)

NOTE: *All sections of the Education Plan should align with all other sections of this application. The State Board of Education shall give priority consideration to the applicants who demonstrate potential for significant, meaningful innovation in education. Provide precise and clear explanations. Lack of response to any question or proper documentation will deem the application incomplete.*

Instructional Program:

Provide a detailed description of the overall instructional program of the proposed charter school, including major instructional methods, assessment strategies, and explain how this instructional program and model meet the needs of the targeted student population.

The care that a teacher takes in understanding their students is key to successful learning within the Montessori philosophy. Montessori teachers are trained to observe their students to get a better understand of who they are as learners. Doctor Maria Montessori used her scientific observational skills to learn what students needed to be successful. A Montessori teacher uses the same care and practice in the classroom. Often there are long blocks of time set up during the day for students to work on integrative projects. During this time teachers note the academic behaviors of their students and make plans to support their learning style. These observations lead to a variety of interventions to support the learning of the students including small group lesson to address misunderstanding one-on-one conferences to help them improve specific skills. The overall effect of this observational time is that students receive a highly specialized learning experience that promotes academic success.

Eldred Montessori teachers will also work to develop a strong sense of community with the students they work with. At the end of her career Maria Montessori moved towards more humanitarian work, spending time with the less fortunate to promote peace and acceptance in the world. In a Montessori environment this concept is taught and developed to create a safe and engaging learning environment. Montessori teachers set up group initiatives for students to explore types of communication, the role of trust in a community, and the different types of leadership that can manifest when working in a group. It is in these conversations that students begin to recognize and appreciate diversity, which is easily transferred to work in the classroom and the community as a whole. Students will learn to embrace diversity through these exercises, which creates a sense of safety and belonging throughout the school.

With high school being one of the final stages of the required education system, we as educators are in the position of preparing our students for adulthood, whether that be higher education, joining the workforce, or joining the military. Marta Donahoe is the founder of the Cincinnati Montessori Teacher Education Program. She was recently interviewed to talk about the work of public Montessori high schools. "'It as to be real,' Donahoe stressed, 'It can't be fake things or just chores. It needs to be real work, like real businesses or real farm work or real service work.' She also noted that adolescents are often cynical about the world, so educators aim to inspire them and make them feel hopeful about the impact they can have." (Schwartz, tinyurl.com/publicmontessori) Eldred Montessori students

Eldred Montessori Secondary School - Eldred Montessori provides authentic learning experiences for passionate young adults so they can flourish in post-secondary education.

will participate in field studies throughout Durham and the surrounding areas that are designed to expose them to different parts of Durham. Intersessions are even larger types of guided experiences where students spend a week working on projects that benefit a specific organization or community. The intersessions could involve local experiences like working with a food bank to create a community garden or could involve something large scale like traveling to the Dominican Republic to help build rainwater barrels for villages in need. This exposure to different parts of society prepare our young adults for life outside of school and empowers them to take action and make change in their community.

Eldred Montessori will offer a full course list to our students, allowing them to meet the high school graduation requirements. Teachers will use common assessments to monitor progress throughout the year and will participate in the English I, Math II, and Biology End of Course tests as well as the ACT Preparedness assessment to ensure the quality of our education program.

Our program will address the diversity of our target population while supporting them to meet their academic goals using the Montessori method of instruction.

Curriculum and Instructional Design:

Describe the basic learning environment (e.g., classroom-based, independent study), including class size and structure for each grade span (i.e. elementary, middle, high) the school would ultimately serve.

The average class at Eldred Montessori will have 25 students per teacher. Half of the time at school will be spent with the teacher giving direct instruction. The rest of the time will be designed for students to work on groupings to meet the needs of their specific projects. Some students could be working together in small groups to finish a service project while the teacher pulls different groups to work on science curriculum. Time will be built into the day so that students will be able to work collaboratively or independently if needed.

Appendix O has a layout of a typical daily schedule for each of the grade levels of our school. A student will have a block schedule for their core content classes. We've selected a block schedule so that teachers and students have long periods of time to explore concepts deeply in class. Students will have either math and English or Science and Social Studies on alternating days.

The core classes will be taught for half of the day. The other half of the day students will be in electives. We have arranged for two electives everyday that will last for 50 minutes. These will be typical electives that cover the high school graduation requirements including PE, Health, Spanish, Art, and Music.

The final class that students will participate in will be a Montessori elective. All of the core and elective teachers will get a group of approximately 16 students, similar to advisory. Each grade level will have its own focus during this Montessori elective time. Freshman will focus on social justice, working with groups like Durham CAN to identify needs in

Eldred Montessori Secondary School - Eldred Montessori provides authentic learning experiences for passionate young adults so they can flourish in post-secondary education.

their community then implementing change to support that need. Sophomores will learn about entrepreneurialism and explore ideas for developing a micro-economy on our campus. Juniors will maintain our community garden and begin implementing a healthful school lunch program using the foods from our garden. Seniors will do internships in the community that will give them exposure to the world of employment and allow them to explore careers they are interested in.

Students who are new to Montessori education typically do not struggle with the transition to this type of school. In Montessori pedagogy, younger students are paired with older students because the younger students learn significantly more when paired with an older student who can show them the way. This is also true in society. When you are surrounded by people behaving one way, you have a tendency to follow the group's behavior. Most times students who are new to Montessori follow their peers and can quickly acclimate to a different learning environment.

Provide a synopsis of the planned curriculum, including:

1. *One sample curriculum outline (in graph form) in the Appendices (Appendix B) for one core subject (specific to the school's purpose) for each grade span (i.e. elementary, middle, high) the school would ultimately serve.*
2. *If you are proposing a high school, as Appendix B2, provide a visual disseminating what courses (core content and electives) will be offered at the charter high school to ensure students meet the proposed charter school's graduation requirements. Please ensure the projected staff and budget aligns with the course offerings.*
3. *Identify how this curriculum aligns with the proposed charter school's mission, targeted student population, and North Carolina Accountability Model.*

Eldred Montessori will provide authentic learning experiences like intersessions and student-led conferences so that it may prepare Durham's Montessori population for adulthood. Students who have come from a Montessori environment will have already experienced the type of growth that comes from being in a Montessori classroom. Students will take all of the courses need to be college ready, but will have the added benefit of knowing themselves as learners and community members which will help them succeed in adulthood.

4. *Describe the primary instructional strategies that the school will expect teachers to master and explain why these strategies will result in increased academic achievement for the targeted student population for each grade span (i.e. elementary, middle, high) the school would ultimately serve.*

Teachers that work at Eldred Montessori High School will be expected to earn their Montessori secondary teacher certification. This is a two to three year long process that involves exploring Montessori philosophy, studying adolescent brain research, and designing learning experiences for the Montessori environment. Teachers will be expected to earn their certification within four years of their hire date.

Certified Montessori secondary teachers become experts in the adolescent brain. Through training they learn how to adapt their education program to fit the needs of diverse learners, helping students grow academically as

Eldred Montessori Secondary School - Eldred Montessori provides authentic learning experiences for passionate young adults so they can flourish in post-secondary education.

well as socially and emotionally. Montessori students will benefit by continuing their education in a well prepared environment that aligns with their early years of school.

An outline of the Montessori training program can be found at the Cincinnati Montessori Teacher Education Program's website. <http://cmstep.com/>

- 5. Explain how the proposed instructional plan and graduation requirements will ensure student readiness to transition from grade to grade and to the next grade span upon program completion.*

The curriculum taught at Eldred Montessori will follow the Standard Course of Study as written by the North Carolina Department of Public Instruction. Teachers will use the standards assigned to each course to design instruction that will prepare their students for the next level of instruction. Counselors will work with students to make sure that all their coursework meets graduation requirements and prepares them for college.

- 6. If you are proposing a high school, describe how the proposed charter school will meet the Future-Ready Core requirements. Provide details on how the students will earn credit hours and how grade-point averages will be calculated?*

Students at Eldred Montessori will be required to take four classes of English, Math, and Social Studies as defined by the Future-Ready checklist. They will take three years of science, two years of a foreign language, and one year of health and pe. The remaining six credit hours students will choose electives they wish to take.

Classes will be assigned a standard four point scale, where an A is a 4.0, B, is a 3.0, C is a 2.0, and a D is a 1.0. Honors courses will be weighted on a 5.0 scale.

- 7. Provide a school academic calendar in Appendix C (minimum of 185 instructional days or 1,025 hours).*

- 8. Describe in a brief narrative below on how the calendar coincides with the tenets of the proposed mission and education plan.*

The attached calendar of Eldred Montessori has 185 days of school as required by the state board of education. These days are sufficient for teachers to cover the standard course of study. There are four early release days scheduled so that teachers may work together to plan the units of instruction for the following quarter. There are four teacher work days to allow teacher to finalize grades at the end of each quarter and semester.

Special Programs and "At-Risk" Students

- 1. Describe the methods and clear systems of prevention and intervention teachers will utilize to provide assistance to students that are not performing at expected levels: ensuring continued progress and academic student growth.*

Eldred Montessori will follow a Response to Intervention (RTI) model to identify students who are at risk. Teachers will constantly be monitoring the progress of their students and when they start to see one of their students struggle then interventions will be put in place to support their

student's success. A true RTI model is one that is created collaboratively with the staff at each school and the faculty of Eldred Montessori will have professional development to support their design of an intervention plan that works for their students. Included is a sample of an intervention plan designed for the middle grades classroom.

Tier 1: Students will attend and participate in lessons, complete assignments on time, have a minimal of distracting behaviors in class, and will monitor their grades weekly. Teachers will work with small groups of students based off of formative assessment used in the classroom. Teachers will keep accurate records of students progress and will monitor grades weekly of student progress. Parents will monitor grades weekly. Parents will also provide a supportive environment at home where students can complete projects and homework. Parents will also communicate to the teacher when there are issues that may hinder their child's learning.

Tier 2: Students will make use of graphic organizers and guided notes to better organize content from lessons. Students will check with their teachers daily to monitor their progress in class. Students will have specific seating to limit the amount of distractions they have in the work environment. Teachers will meet daily with students to give them feedback on their academic goals. Teachers will provide graphic organizers and guided notes for lessons. Teachers will also conference with support staff to discuss the observed behaviors. Parents will check assignments daily. Parents will communicate goal progress with the teacher as needed. Parents will participate in a conference to develop goals.

Tier 3: Students will have assigned seating in lesson and will keep all notes and assignments in a designated notebook. Student will work with the teacher to modify assignments so as to be able to demonstrate mastery. Students will work with the teacher or use other tools to finish assignments in a timely manner. Teachers will modify assignments as appropriate to allow student to demonstrate mastery. Teacher will use a range of different deliver options of the content. Teacher will arrange for support when completing assignments. This could be through one on one instruction or with examples of completed work. Teacher will conference with support staff, including counselor, lead EC teacher, and or ESL teacher. Parents will review new content with children to reinforce mastery of the material. Parents will review timelines to support the completion of assignments. Parents will communicate with the teachers on the progress of goals.

If these interventions do not help a child succeed in the classroom then they will be referred to the school wide intervention team to explore additional testing.

2. *Explain how the instructional plan and curriculum will meet the needs of English Language Learner (ELL) students, including the following:*

- a) *Methods for identifying ELL students.*
- b) *Specific instructional programs, practices, and strategies the school will employ to ensure academic success and equitable access to the core academic program for ELL students.*
- c) *Plans for monitoring and evaluating the progress and success of ELL students, including exiting students from ELL services.*

Upon acceptance to Eldred Montessori, parents will fill out a series of surveys to help us better teacher our students. One of these surveys will be

the Home Language Survey (HLS). If it is identified that a student uses other languages than English at home then the LEP coordinator or ESL teacher will begin an investigation to better understand the abilities of the enrolled student. If deemed that the student is a language minority the parents will be notified and the WIDA Access Placement Test (W-APT) will be administered to determine the student's area of eligibility. From this assessment the ESL teacher will document the identification and then design goals to help the student in the classroom. The teacher, parent, ESL teacher and student (where appropriate) will work together as a team to develop modifications for the classroom and testing procedures.

Students with different learning needs often benefit from attending a Montessori school. This is because the teachers are trained in how to provide differentiated lessons and assignments for students and keep accurate records to monitor student growth. Students with LEPs benefit from one on one instruction with the teacher as well as participating in small group instruction. Teachers can easily shift the focus on class assignments so that ESL students are working on their language goals as well as their content goals. It is also not unusual to have multiple teachers in the Montessori classroom, making it easy for the ESL teacher to work with students in the classroom on differentiated assignments.

Yearly ESL learners will be assessed using the ACCESS for ELLs. Students will be evaluated by the ELL teacher who will then document and share the results of the testing. To be exited from the ELL program students must have a composite score higher than 5.0 on the ACCESS test. If the student places out of the ESL program then they will be monitored yearly for two years to ensure their continued success in school.

3. *Explain how the school will identify and meet the needs of intellectually gifted students, including the following:*
 - a) *Specific instructional programs, practices, strategies, and opportunities the school will employ or provide to enhance their abilities.*
 - b) *Plans for monitoring and evaluating the progress and success of intellectually gifted students.*

If a student has come to Eldred Montessori from one of the local LEAs, our AIG coordinator will request records from the LEA so as to secure the documentation of our intellectually gifted students. If there is record of being tested or the student comes from a private school the AIG coordinator will arrange for testing of the student. If the student is identified as intellectually gifted then parents, teachers, and the AIG coordinator will work together to develop a Personal Education Plan (PEP) for the student that will have accommodations and goals. The teacher will report each quarter on the progress of the student towards these goals. Similar to the needs of the At-Risk and ELL population, the Montessori teacher will differentiate instruction to support the needs of the student. Some students will have the opportunity for acceleration through the curriculum while others will have enriched assignments to stretch their understanding and application of concepts.

Exceptional Children

The public charter school cannot deny admission to any child eligible for special education services as identified under the federal legislation Individuals with Disabilities Education Improvement Act (IDEA),

*IDEA regulations, and Article 9 115C of the North Carolina General Statutes, North Carolina Policies Governing Services for Children with Disabilities. **All public schools are responsible for hiring licensed and 'highly qualified' special educators pursuant to law.** Public schools are required to provide a full continuum of services to meet the unique needs of ALL students with disabilities.*

Identification and Records

1. *Explain how you will identify students who are enrolled within the charter school that have previously been found to be eligible for special education services or are protected under Section 504 of the Rehabilitation Act.*
2. *Provide the process for identifying students who may be eligible for special education services as identified in the federal 'Child Find' mandate. Be sure to include how student evaluations and assessments will be completed.*
3. *Provide a plan detailing how the records of students with disabilities and 504 Accommodation plans will be properly managed.*
 - a) *Requesting Records from previous schools*
 - b) *Record Confidentiality (on site)*
 - c) *Record Compliance (on site)*

Upon admission to Eldred Montessori, parents must complete an admissions packet that covers pertinent information about the student. Parents will be asked if their child has had an IEP or 504 plan at another school. If the parent indicates that there is a plan in place the lead EC teacher will request the records from the previous school. Once the records have been received, the EC case manager will review the IEP, making sure that the files are in compliance. Once the records have been reviewed they will be stored in a secure location in the school.

In the At-Risk section we described our RTI plan for students who may not be doing well in school. The RTI plan is designated to provide appropriate documentation for an IEP team to decide the best course of action for a student. When a student has reached level three of the RTI plan an IEP team will be formed to evaluate the student's learning. If, upon evaluation, the team finds they need more information then a request will be made to have further testing done to better understand the student's learning needs. If testing shows that there is a disability present then the IEP team will work together to write goals and identify accommodations for the student's learning.

If it is indicated there is a current IEP at another school, the lead EC teacher will will out a request for records form to retrieve the documents. All student records will be kept in a locked file cabinet behind a locked door at the school. Copies of an IEP will be shared with a student's teachers, but must be kept in a secure and locked location within the classroom. At the end of the academic year all copies should be returned to the EC case manager. Yearly the lead EC teacher will audit all the EC files to make sure that the records are in compliance with state law.

Exceptional Children's Education Programming

1. *Describe the educational programs, strategies, and additional supports the school will provide to ensure a full continuum of services for students with disabilities.*
2. *Describe the methods and support systems that will be in place to ensure students with disabilities receive a Free and Appropriate Public Education (FAPE).*
3. *Describe how implementation of the Individualized Education Plan (IEP) will be monitored*

Eldred Montessori Secondary School - Eldred Montessori provides authentic learning experiences for passionate young adults so they can flourish in post-secondary education.

and

reported to the student, parents and relevant staff.

4. Describe the proposed plan for providing related services.

Eldred Montessori will provide a range of supports for students with an IEP. All of these supports will be provided in such a way that students will be placed in the least restrictive environment for their learning needs. Every EC student in our school will have an EC case manager who will be responsible for monitoring the growth of the student. The case manager will work with the teachers to provide strategies for the student's success. These strategies may include modified assignments or sample problems. They may also include pulling the student out of the classroom for short periods of time to deliver one on one instruction. The type of support is determined by the student's needs and will be made available to the student, regardless of what the need is.

All eligible students will receive a free and appropriate education at Eldred Montessori. No one will be discriminated against to due to a disability. The school will have a lottery enrollment process that will ensure students with disabilities have a fair and equal chance of attending our school. A full continuum of educational services will be offered.

The classroom teacher and EC teacher will meet weekly to discuss the goals of their students with IEPs. The EC teacher will send home progress reports half way through the quarter as well as send home a report card at the end of each quarter. Yearly the IEP will be reviewed by the IEP team to go over goals and monitor progress. Every three years a student will be reevaluated to make sure that the IEP still reflects the student's learning needs.

If a student requires related services that are not provided by the school, then the school will arrange to have an outside consultant to come to the school to work on the student's goals.

Student Performance Standards

- 1. Describe the student performance standards for the school as a whole.*
- 2. Explain the use of any evaluation tool or assessment that the proposed charter school will use in addition to any state or federally mandated tests. Describe how this data will be used to drive instruction and improve the curriculum over time for the benefit of students.*
- 3. Explain the policies and standards for promoting students, including students with special needs, from one grade level to the next. Discuss how and when promotion criteria will be communicated to parents and students.*
- 4. Provide the public charter school's exit standards for graduating **ALL** students. These standards should set forth what students in the **last grade served** will know and be able to do. Be sure to include plans for the "At-Risk" population.*

Eldred Montessori's academic performance will be comparable to the surrounding charter and public schools in the area. Having looked at these school's scores we have selected the following goals for our school.

High School Averages

Math I - 69%

English II - 73%

Biology - 68%

ACT Proficiency - 75%

Eldred Montessori Secondary School - Eldred Montessori provides authentic learning experiences for passionate young adults so they can flourish in post-secondary education.

Teachers will use formative and summative assessments to track student progress with the standards. Teachers will use a standards based lesson plan to guide their instruction and all assessments will be driven by standards based goals. Data will be used every two weeks to review student's performance. When a student's scores start to slip and it is questionable that the student will perform well on the standardized assessment then the student will be referred to the RTI team so that they can receive assistance with their learning. As units are completed, teachers will review their student's success and modify the unit as needed to achieve a higher success rate.

Promotion

For a student to be promoted to their sophomore year they must have passed 6 credits of school. To be promoted to their junior year of school they must have completed 12 credits and to be promoted to their senior year they must have completed 18 credits. If a student does not complete the number of credits required they may pursue alternative methods to earn the necessary credits, including summer school or online courses.

Students with special needs will be required to complete the same amount of credit requirements as a standard student, with modifications being allowed as that have been documented by the EC team.

Student Conduct:

*Provide a brief narrative that disseminates how student conduct will be governed at the proposed charter school and how this plan **aligns** with the overall mission and proposed Education Plan of the charter school.*

Provide a draft copy of the student handbook specific to the proposed charter school within the appendices (Appendix D).

Be sure to include:

- 1. Practices the school will use to promote effective discipline.*
- 2. A preliminary list and definitions of the offenses which may result in suspension or expulsion of students.*
- 3. An explanation of how the school will take into account the rights of students with disabilities in regards to these actions that may or must lead to suspension and expulsion.*
- 4. Policies and procedures disseminating due process rights, including grievance procedures, for when a student is suspended or expelled.*

The benefits of a Montessori school is that the teachers are trained in how to create a nurturing and respectful environment. Students are taught about appropriate behaviors and are asked to reflect individually as well as in large groups about the impact behaviors have on the community as a whole. In addition teachers respond to the students rather than to a behavior when incidents occur. Each student is expected to treat their environment, the people around them, and themselves with respect and when that does not happen the teacher works with the student to figure out why the negative behaviors are happening and provides structure so that the student can model appropriate behaviors while at school. There are tiers of interventions for student behavior similar to that of the academic performance that will be followed.

Tier 1: Distracting Behavior

Students socialize during instruction. They zone out during a lesson. They waste time sharpening pencils so they can avoid doing work. All of these are minor behaviors. The teacher will meet one on one with the student to develop a plan to help them address their behavior. This could mean moving their seat or pairing them with a student who will not socialize with them.

Tier 2: Hurtful Behavior

Occasionally students will get frustrated and curse or will play excessively in the hallways. These behaviors are often done in the heat of the moment and affect the people that are around the student in the situation. The teacher will meet one on one with the student to discuss how the situation occurred. Next the teacher and student will assess what needs to happen to help the student learn to control themselves and then look at how to mend the relationships of the students affected by the incident. Lastly the teacher will support the students while they make amends and work towards controlling their behavior.

Tier 3 Destructive Behavior

Fights, bullying, sexual behavior, and bringing illegal substances on campus are all considered to be dangerous behaviors at school a student that has taken part in these behaviors must immediately report to the principal and be subject to a potential suspension.

The discipline policy and Eldred Montessori is very specific to the individual, which benefits students with disabilities. When students with disabilities demonstrate behaviors that are inappropriate, the teacher, student and EC teacher will work together to develop a plan that will fit the needs of the student. The EC student will still be held accountable for their behaviors and could be subject to suspension if deemed necessary. If students are suspended for more than ten days than a manifestation meeting will be held to assess whether the documented behaviors were a result of the student's disability or the student's free will.

All students and families of Eldred Montessori have due process rights. If there is a family who wishes to pursue the grievance procedures they will follow these guidelines.

First, the parent of student should bring the concern to the teacher involved in the disciplinary action. If the parent feels like the matter is not resolved then they should schedule an appointment with the principal to address the concerns. If the concerns are still not addressed the the parents should write a formal complaint detailing the date, the actions of all parties involved, the school's response, the parent's concern, and the request for change in the disciplinary action. This complaint should be submitted to the school's governing board and will be addressed at the next board meeting.

Section III: Education Plan Concerns and Additional Questions		
Can the applicant describe a "integrative project" with respect to content and high school course work?	Kevin Piacenza	Instructiona
Can the applicant clarify the origin and nature of the "common assessments" referred to in this section?		
Can the applicant cite existing high school Montessori programs and their effectiveness with similar target populations?		
Applicant needs to provide evidence-based research on the efficacy of the Montessori model for high school students and specifically research with similar demographics to the proposed student population in Durham County.	Cande Honeycutt-Killian	Instructiona
It is not clear what the details of the instructional program are. Terminology used is not expanded upon to provide a clear picture of what a day in this school would be like for students. More information is needed on integrative projects.		
The applicant provides very little information about the actual instructional methods and instructional program outside of real world work options. There is not researched based data to support that the HS Montessori approach will be successful with the targeted population of Durham or that school will be able to attract the diverse student population outlined in the mission section. How will the instructional strategies reengage disengaged adolescents/ This is especially true if the local Montessori ES and MS are not diverse (i.e. private, magnet schools). applicant should be asked to provide more information on the assessment strategy to be used t make sure students are successful and the program is meeting the needs of all students.	Tracy Kelley	Instructiona
Explain more what the half day of specific teacher instruction will look like. Curriculum outline appeared to be cut off leaving the document unclear.	Buffy Fowler	Curriculum a
How will the school ensure students who are unfamiliar with Montessori methodology would be successful in this school? How will the school ensure a smooth transition?	Cande Honeycutt-Killian	Curriculum a
Applicant needs to provide further details on how multi-age course assignments would ensure appropriate course selection for credit.		
"Students who are new to Montessori education typically do not struggle with the transition to this type of school" What evidence is the applicant basing this statement on? Would that be true at both elementary and secondary levels?	Kevin Piacenza	Curriculum a
How will multi-age grouping affect course placement and course credits?		
Applicant spends a lot of time discussion how this model will benefit students who are familiar with Montessori curriculum and structure but does not discuss how it will work for 9th grade student who are completely unfamiliar with the Montessori way.	Tracy Kelley	Curriculum a
Will daily schedule/format meet the minimum required contact hours per course? Projected course offerings for year 1 are confusing-English 1 & 2; Math 1, 2, and 3; Earth Science and Biology, Spanish 1 & 2 for 9th grade? Honors courses only receive 0.5 extra weight.	Sherry Reeves	Curriculum a
Applicant needs to be asked how it will ensure that all student get the supports they need when the application states that students will get what they need if and when a teachers notices there is a need? Will there be a formal process with support systems for communication, referral, modifications, tracking , accommodations etc. How will teachers and staff be trained to create their own RTI system.	Tracy Kelley	Special Prog
Explanation of RTI process does not support an understanding of RTI.	Sherry Reeves	Special Prog
Applicant refers to RTI although most schools have transitioned to MTSS. Applicant fails to provide process for intervention for students. How will students be identified? How will interventions be implemented? Additional details are needed to ensure the applicant has a strong plan for serving at-risk students.	Cande Honeycutt-Killian	Special Prog
The narrative speaks primarily to accommodations and not necessarily the intervention process to be utilized. What is the specific plan?	Glenn Allen	Special Prog
Applicant needs to provide additional information on how they will implement Child Find outside of the admissions/enrollment time period. Plan lacks details sufficient to	Cande Honeycutt-Killian	Exceptional

Eldred Montessori Secondary School - Eldred Montessori provides authentic learning experiences for passionate young adults so they can flourish in post-secondary education.

have clear evidence that they will be able to follow federal law.		
What is your child find process other than the admissions packet and how will you handle parent referrals? It should be noted that the RTI process is not the road to EC but rather a process to provide supports to all students.	Glenn Allen	Exceptional
Applicant needs to expand upon this section to demonstrate they will be able to provide the full continuum of services.	Cande Honeycutt-Killian	Exceptional
Plan is vague.	Glenn Allen	Exceptional
Is RTI the process for identifying "new" exceptional children?	Sherry Reeves	Exceptional
What is your specific plan for promotion and retention of students with disabilities? How does the school propose to meet the unique individual needs of students? Is there a team that will review all data.	Glenn Allen	Student Perf
Applicant needs to expand upon the data used. What were the actual percentages of the public and charter schools in Durham County that you used to create performance goals? Why are these percentages different from those listed in previous section based on state average or 60%? Does the school have any goals related to growth? What is the specific promotion/retention requirements for students with disabilities? How will the student's IEP be used to determine promotion or retention? Applicant needs to provide additional details on what is required for credit issuance.	Cande Honeycutt-Killian	Student Perf
Explain how the percentages were determined and put the information into SMART goals. Explain how students receive credits for the classes. More information is needed about assessment tools and reflecting on student learning.	Buffy Fowler	Student Perf
The student performance goals evidence low expectation for student learning as they are not substantively rigorous when compared to the LEA. Promotion criteria are not clear and the applicant does not provide evidence that the evaluation and assessment tools will result in data that will drive instruction, improve the curriculum to meet the needs of all students. Again, the applicant needs to specifically identify what formative assessments will be used and how that data will serve as the basis for evaluating the overall instructional program, and refine the curriculum as need according to student progress. The ability to be flexible is not evidence and to modify the Montessori curriculum if data reveals that students are not learning.	Tracy Kelley	Student Perf
"Eldred Montessori's academic performance will be comparable to the surrounding charter and public schools in the area. Having looked at these school's scores we have selected the following goals for our school"- can the applicant provide the specific scores it is using to predict "comparable" performance goals for the school? How many schools? How many years of performance by these schools? Has growth been considered when establishing the performance goals?	Kevin Piacenza	Student Perf
Will the school also offer a Future Ready Occupational Course of Study?	Sherry Reeves	Student Perf
The discipline and culture plans are not aligned to the Montessori way and are not likely to create a sustain a safe and orderly learning environment. Applicant missed opportunity to share the core tenets of Montessori guiding principles and core beliefs especially with regard to social justice precepts that can often reengage disengaged adolescents. It appears that the applicant group has little experience working with HS student populations and assumes that students will already be familiar with the Montessori way of thinking and learning and interacting.	Tracy Kelley	Student Cond
Is there evidence supporting this discipline approach at the high school level? Does the teacher handle all behavior issues up to Tier 3?	Kevin Piacenza	Student Cond
How will you handle children with disabilities. This plan is vague and does not address providing services upon removal or following Policies Governing Services for Children with Disabilities.	Glenn Allen	Student Cond
Applicant needs to provide additional details on how this approach to discipline would serve high school students in providing a safe educational environment. At what point will an administrator be involved in this process? What are the specific disciplinary processes for students with disabilities? Like previous sections, applicant needs to	Cande Honeycutt-Killian	Student Cond

Eldred Montessori Secondary School - Eldred Montessori provides authentic learning experiences for passionate young adults so they can flourish in post-secondary education.

provide more details.		
-----------------------	--	--

Reviewer	Score
Deanna Townsend-Smith	
Buffy Fowler	Pass
Sherry Reeves	Fail
Tammi Sutton	
Tracy Kelley	Fail
Steven Walker	Pass
Tracy Kelley	
Robert McQuat	
Avril Smart	
Glenn Allen	
Phyllis Gibbs	
Kevin Piacenza	Pass
Cande Honeycutt-Killian	Fail
Anthony Helton	Pass

IV. GOVERNANCE and CAPACITY

(No more than ten total pages in this section)

NOTE: Please answer all sections completely. Do not use "same as LEA" or "whatever the law states". Lack of proper documentation could deem the application incomplete.

Governance:

Private Nonprofit Corporation:

*The nonprofit corporation must be officially authorized by the NC Secretary of State upon application submission.

Name of Private Nonprofit: Eldred Montessori Secondary School

Mailing Address: 2208 Collier dr

City/State/Zip: Durham NC 27707

Street Address: Durham

Phone: 919-883-7662

Fax:

Name of registered agent and address: Laine Staton

FEDERAL TAX ID:

Tax-Exempt Status 501 (c)(3)

The private nonprofit listed as the responsible organization for the proposed charter school has received 501 (c)(3) status:

- Yes (copy of letter from federal government attached: Appendix D)
- No

NOTE: If the non-profit organization has yet to obtain the 501(c)(3) status, the tax-exempt status must be obtained from the Internal Revenue Service within twenty-four (24) months of the date the Charter Application is given final approval.

Governance and Organizational Structure of Private Non-Profit Organization:

The private nonprofit corporation is the legal entity that has responsibility for all aspects of the proposed charter school. Its members should reflect the ability to operate a charter school from both business and education perspectives.

Please complete the table provided depicting the initial members of the nonprofit organization.

Board Member Name	Board Title	County/State of Residence	Current Occupation	Past or Present Professional Licenses(s) Held	Has any disciplinary action been taken against any of these professional licenses?
Kinsey Weners	Trustee	DURHAM	Preschool Administra		

trom			tor		
Tori Gredvig	Trustee	DURHAM	Librarian		
Geraud Staton	Trustee	DURHAM	self-employed		
Laine Staton	Chairperson	DURHAM	teacher		
Helen Hindley	Trustee	Out of State	Retired		

Please provide the following in this location of the APPLICATION:

1. *A description of the governance structure of the proposed charter school, including the governing board's functions, primary duties, roles and responsibilities as it relates to overseeing the charter school. Include how the board will recruit, hire, and supervise the lead administrator.*

Eldred Montessori will have a governing board that will lead the school to success. The primary responsibilities of the board will be to communicate the vision of the school, monitor the finances, fundraise for additional resources, recruit families of the school, and to support and evaluate the head of school on their performance.

It is important that the head of school is a well suited candidate for the school. To be a Montessori administrator you must be able to perform administrative duties as expected by a head of school. In addition it is important the head of school be comfortable with Montessori philosophy and be able to adjust their administrative style to fit the need of the school. The administrator chosen must have their Montessori certificate or be willing to commit to earning their certificate. It is the Board of Trustees' job to recruit and hire candidates who fit this profile. When looking for a person to fill the Head of School position the board will first start by forming a hiring committee who will start and extensive search, posting the position on at least three different education websites as well as the American Montessori Society's website. the hiring committee will then review applications and select their top candidates to interview. After interviewing candidates the committee will make a recommendation to the Board of Trustees on who should be hired.

2. *Describe the size, current and desired composition, powers, and duties of the governing board. Identify key skills, areas of expertise, and constituencies that will be represented on the governing board. Explain how this governance structure and composition will help ensure that a) the school will be an educational and operational success; b) the board will evaluate the success of the school and school leader; and c) there will be active and effective representation of key stakeholders, including parents.*

Currently there are five members on the planning board for the school. There is a mix of experiences in the group including business owners, parents and educators. The permanent board should have between five and nine members and always an odd number of members. The governing board should have a variety of different experiences including parents, educators, business owners, and community leaders. The board should also reflect the population of Durham, making efforts to recruit a diverse governing body. The board will be responsible for evaluating the head of school, approving the budget, setting the vision of the school, and recruiting new faculty members to the school. Additional responsibilities are outlined in the bylaws of the board.

Our board will be diverse so that we are representing all of the stakeholders in the school. This way we will make sure that all voices are heard when it comes to making decisions that impact the quality of the school.

- 3. Explain the procedure by which the founding board members have been recruited and selected. If a position is vacant, how and on what timeline will new members be recruited and added to the board?*

Laine Staton is the founding member of the board. She was also one of the founding teachers at Lakewood Montessori Middle School and saw first hand the impact a Montessori environment could have on adolescents from diverse backgrounds. Early on in Laine's career she completed her Masters in School Administration and used her degree to mentor and provide professional development for teachers across Durham Public Schools. Her unique combinations of skills is allowing her to serve the population she works with by opening this Montessori high school.

Once the decision was made to open a Montessori high school, Laine began approaching potential stakeholders to investigate their interests in the project as well as network other potential candidates for the board. Several meetings were held to discuss the process for applying for a charter, what the vision of the school could be, and what assets individuals could bring to the process. If it felt like the partnership would be a good fit, the stakeholder was invited to join the board. Board members have since met weekly to discuss the progress of the charter application.

Geraud Staton is a self-employed social entrepreneur. He consults with people to help them start their own business. Geraud and Laine worked together at Lakewood Montessori Middle School to support the growth of Lakewood's entrepreneur club. Geraud consulted with Laine on how to coach the students and occasionally met with the club to help them flesh out their business ideas. Geraud was invited to be a member of this board because of his business background and his personal goals of serving the at-risk population of Durham. He will be able to support the board by reviewing operational goals and marketing to families for enrollment.

Tori Gredvig is a librarian at Lakewood Montessori Middle School. For the past three years Tori has served on the leadership team at Lakewood Montessori. In this role she has led school wide events, planned and implemented professional development for the staff, and created units of instruction to support the Montessori philosophy. Tori was invited to join the board because of her ability to be detail oriented while at the same time taking into consideration all of the stakeholders of the school. she will support the board by thinking about all the details of the goals for the school and will help with aligning the goals to our missions.

Helen Hindley is a retired music teacher, principal, and education professor. She was responsible for restructuring Deer Park Elementary, Middle, and High School. When hired Deer Park was a failing rural school in eastern Washington state. Mrs. Hindley applied for a grant that brought the Core Knowledge program to her school, improving the quality of the school significantly. Mrs. Hindley has mentored Laine Staton for the majority of her career and has frequently had discussions about the direction of charter school. It seemed like a natural fit to include her aspart of the board because of her experience with working with small, non-traditional schools.

Kinsey Wennerstrom is a parent of three Montessori children in Durham Public Schools. She was one of the parents responsible for proposing a Montessori Middle school to DPS's school board and was on the initial School Improvement Team when the school started. Mrs. Wennerstrom was invited to join the board because of her experience as a parent of elementary, middle and high school children. She has also has a significant amount of background information about secondary Montessori programs due to her work in opening Lakewood Montessori Middle School.

4. *Outline below the strategic board calendar detailing how often the board will meet according to the bylaws established.*

The governing board will meet once a month to discuss academics and finances of the school. Governance will be discussed as needed, when evaluations are required for annual review or when new board members are being elected.

5. *What kinds of orientation or training will new board members receive, and what kinds of ongoing professional development will existing board members receive? The plan for training and development should include a timetable, specific topics to be addressed, and requirements for participation.*

Each board member will attend a series of trainings so that they are comfortable with the roles and responsibilities of the governing board. Topics that are covered could include finances, charter school law, and/or Montessori Pedagogy. In addition, all board members will receive then hours of professional development through out each year to support the work they will don on the board.

6. *Describe the board's ethical standards and procedures for identifying and addressing conflicts of interest. Identify any existing relationships that could pose actual or perceived conflicts if the application is approved; discuss specific steps that the board will take to avoid any actual conflicts and to mitigate perceived conflicts.*

It is important that there is transparency with the governing board and the school community to be able to maintain its integrity. The board will frequently and consistently make sure that they are in compliance with the bylaws of the organization and NC State Charter Law. All meetings will have accurate and timely reports that will be shared with the community. These measures will help uphold the ethics of the board.

A conflict of interest is considered to have occurred when one part gains to benefit from a decision that is being made. To avoid conflicts of interest each board member, at the beginning of each year, will sign a Conflict of Interest Form and declare any conflicts that they foresee happening in their role on the board. This will help people maintain the integrity of the position of board member. Employees of the school may serve on the board but will not vote on issues where the decision directly impacts them as a teacher. When it is questionable whether or not a board member has a conflict of interest the board will share its concern with the individual and then they will be given a chance to speak to the board's concerns. If there is evidence that the board member has failed to disclose information, there is a conflict of interest, or that the individual has broken board policy then corrective action will be taken.

Currently there are no conflicts of interest with our application.

7. *Explain the decision-making processes the board will use to develop school policies.*

In accordance with NC Charter Law, the Board of Trustees will consider all stakeholders that will be affected by this decision and the collect information to better inform themselves of their options. Once information

has been gathered, the board will consider these options and how it will impact the community as a whole. Occasionally a closed meeting may be necessary to discuss information that may affect the decision. Finally the board will vote on the issue to make a decision.

8. Describe any advisory bodies, councils, or associations listed in the organization chart or to be formed, including the roles and duties of that body, and the reporting structure as it relates to the school's governing body and leadership.

There will be several different subgroups of the Board of Trustees to allow for a more focused group of individuals to work on areas of the school. The following is a list of the potential groups that may form. All of these groups will report to the board of trustees.

Hiring Committee: This committee's responsibility will be to recruit new faculty members to the school. The board will advertise on various websites, make sure that positions are posted in a timely manner, conduct interviews, and hire faculty in a timely manner.

Principal Evaluation Committee: This committee will be responsible for working with the principal to create and maintain professional goals using the NC Principal Standards to ensure the leadership of the school is strong.

Fundraising Committee: This committee will be responsible for developing a fundraising plan that will support the school in purchasing technology, sending teachers to conferences, and maintaining the school environment.

Parent/Teacher/Student Organization (PTSO): This group is responsible for parent and student involvement in the community. They will also provide educational sessions for parents with topics like "Teen Drinking", "Secondary Montessori Education", and "Social Media".

School Improvement Team (SIT): This group will be responsible for creating and reviewing the school's goals.

9. Discuss the school's grievance process for parents and staff members.

In the event that there is a grievance that needs to be addressed with the school, the concerned party will first be encouraged to address the issue directly with the person of concern. If the matter is not resolved then the complainant should take their concerns to the Head of School. If the concern is with the Head of School then the complainant should direct their concerns to the Board of Trustees of the school. If the matter is still not resolved by addressing the head of school then the grievance should be put in writing and submitted to the Board of Trustees. The letter should include details of the complaint including the date, people involved, area of concern, actions taken thus far, and requested actions. The board will address the issue in a timely manner. Mediation or legal representation will be arranged when requested. The board will make a decision about the complainant's grievance. All board decisions are final.

Governance and Organizational Structure of Private Non-Profit Organization (continued)

Include in the Appendices:

1. A well-defined organizational chart showing the relationship of the Board of Directors to the parents and staff of the proposed charter school. This chart should also include lines of

Eldred Montessori Secondary School - Eldred Montessori provides authentic learning experiences for passionate young adults so they can flourish in post-secondary education.

authority to and from any outside entity that will play a role in managing or supporting the charter school (such as educational service providers, advisory bodies or parent/teacher councils).

(Appendix E)

2. *A one-page resume from each founding board member and responses to the questions found on the Charter School Board Member Form (Appendix F).*
3. *The proposed by-laws, which must include a Conflict of Interest Policy for board members and a stated commitment to the NC Open Meetings Law (Appendix G).*
4. *A copy of the articles of incorporation from the NC Department of the Secretary of State. (Appendix H)*

Proposed Management Organization (Educational Management Organization or Charter Management Organization)

If the proposed school does not intend to contract with an education service provider, mark "Not Applicable" and follow the direction #3 in the Application Specifications.

X Not Applicable

Private School Conversions: complete ONLY if the proposed charter is a private school conversion.

Otherwise, mark "Not Applicable" and follow the direction #3 in the Application Specifications.

X Not Applicable

Applicable" and follow the direction #3 in the Application Specifications. Understand that the replication means that a new charter school will be governed separately from the charter school the application is modeled after.

X Not Applicable

Projected Staff:

Outline below, a list of positions anticipated for the charter school; (e.g., principal or director; finance officer, administrative support staff; teachers (part-time and full-time); paraprofessionals/teaching assistants, clerical, and maintenance.). Be mindful that your predicted administration and staff match the projected enrollment noted in Section I, course offerings and align with the proposed budget.

Head of school

First year - 4 classroom teachers, Second - 8, Third - 12, Fourth/Fifth - 16

First year - 2 elective teachers, Second - 3, Third - 4, Fourth/Fifth - 5

Administrative assistant

Bookkeeper

First year - 1 EC teacher, Second - 1, Third - 2, Fourth - 2 (or as needed based off the population)

Cafeteria employee

Bus driver

Guidance Counselor

Librarian

Staffing Plans, Hiring, and Management

Include the following information for the proposed charter school:

To recruit teachers we will use education websites to post vacancies, as well as post the positions on our website and the American Montessori Society's website. Teachers who apply must show a talent for teaching as well as have a common vision for what Montessori education should look like.

Eldred Montessori Secondary School - Eldred Montessori provides authentic learning experiences for passionate young adults so they can flourish in post-secondary education.

The highlight of working for Eldred Montessori is that we will support all teachers in getting their Montessori credentials. Upon hiring, teachers will begin a two or three year long program that covers Montessori philosophy, pedagogy, and curriculum design. This training is one of two that is available in the country and is known for training teachers who are preparing to teach in a public Montessori school. A master's degree is offered along with this training and will be made available to Eldred Montessori's teachers. While the training is expensive at \$8,000 per person, Eldred Montessori will work with teachers to finance the training through grants and professional development funds. Montessori certification benefits a school in two different ways. One, the school has committed and passionate educators who are highly trained in teaching adolescents. Two, it offers teachers a way to grow professionally and become leaders in the field of education. In addition to receiving their Montessori certification, teacher will earn a salary above the state scale and will have full health and dental insurance through the school. Attached is an outline of the training program.

2. Provide a description of the relationship that will exist between the charter school employees and the nonprofit board.

Employees will be hired by the board for Eldred Montessori Inc. The board will work with the Head of School, but will ultimately be responsible for the hiring, evaluation, and dismissal of the Head of School. The Head of School will manage employees of Eldred Montessori.

4. Outline the board's procedures for hiring and dismissing school personnel, including conducting criminal background checks.

When there is a position open at Eldred Montessori the job will be posted on several different websites. First, the position will be posted on our school's website. It will also be posted on various education websites as listed referred to in the section talking about recruitment and hiring the Head of School.

Once resumes have been received the hiring committee will review resumes and select candidates they feel they would like to interview. Interviews will be conducted using a standardized list of questions that will cover a mix of curriculum, management, professional drive, and philosophy type questions. The hiring committee may choose to invite a candidate back to do model lessons.

The final candidate(s) will have background checks performed and references called. If everything is clear then the candidate will meet the Head of School before they receive the final recommendation to hire.

Unfortunately there may be instances when an employee needs to seek employment elsewhere. If it is found that an employee has broken any of the Code of Ethics policies as defined by the North Carolina Board of Education then it is grounds for their immediate dismissal.

If there is a teacher who is performing poorly in the classroom then the teacher will work with the Head of School and/or mentor teacher to develop an improvement plan to ensure the teacher's success. If the teacher is unable to modify their instruction within the appropriate amount of time then it will be recommended to the board that the employee be dismissed. The board will consider all pieces of evidence and make a final decision about

Eldred Montessori Secondary School - Eldred Montessori provides authentic learning experiences for passionate young adults so they can flourish in post-secondary education.

the employee's termination.

5. Outline the school's proposed salary range and employment benefits for all levels of employment.

Head of School \$60,000 - \$100,000
Teachers \$45,000 - \$65,000
Administrative Assistant \$40,000
Bookkeeper \$35,000 - \$45,000
Cafeteria Employee \$32,000
Bus Driver \$30,000
Guidance Counselor \$40,000 - \$55,000
Librarian \$40,000 - \$55,000

Teachers will receive a 5% salary increase after their certification is complete. They will also receive a 2% pay increase yearly. All employees will have access to the State Health plan. Both medical and dental will be covered. After completion of their third year employees will have the option of contributing to their retirement. Eldred Montessori will match their contributions.

6. Provide the procedures for employee grievance and/or termination.

The employee with a grievance will report the incident in writing to the Head of School. The Head of School will arrange a meeting with the individual to see if the matter can be resolved.

If the matter cannot be resolved by the head of school then the employee may request a meeting with the grievance committee, which will be a subcommittee of the governing board. The request must be submitted within 15 days of the incident. The committee has 30 days to respond to the request. They will hear the details from the employee and collect further evidence if necessary.

The committee will have 30 days from the board meeting to make a final decision. Their decision will be final for all grievances.

7. Identify any positions that will have dual responsibilities (within or without the organization) and the funding source for each position.

Our school will be a relatively small school as compared to the high schools in Durham and so it will be important for Eldred Montessori to find employees who have dual certification to ensure our diverse population will receive the services they need. Employees who are dual certified in their designated content area as well as either AIG, ELL, or EC education are considered highly desirable.

For teachers who are not dual certified we will look at options to support our teachers in acquiring such certifications and additional training. Duke University has a gifted certification program that certifies teachers. There is also an ESL training program we will explore for our teachers. If necessary we will use professional development funds and grants to pay for these additional certifications.

8. Describe the plans to have qualified staffing adequate for the anticipated special needs population, means for providing qualified staffing for ELL and gifted students.

A Montessori environment is ideal for students with diverse learning needs because of the training that teachers receive in how to differentiate their curriculum. Teachers will design learning experiences that offer many options for students to learn and demonstrate mastery. The teachers will track and communicate their student's progress through the curriculum and

Eldred Montessori Secondary School - Eldred Montessori provides authentic learning experiences for passionate young adults so they can flourish in post-secondary education.

make adjustments to the learning process as necessary to ensure their success.

If any one of the populations are large enough then a full or part time teacher will be hired to support these special needs students.

9. *Provide a narrative detailing the roles and responsibilities, qualifications and appropriate licenses that each position must have to be hired by the non-profit organization and effectively perform the job function(s).*

Teachers must have a 4 year degree from a college or university and experience working with adolescence. All teachers must have a teaching philosophy that is aligned with the mission. Teachers will be responsible for developing curriculum, assessing students, designing and/or participating in intersessions, supporting the school's micro-economy, communicating and developing relationships with families, supervising students for safety, and other duties as needed by the school.

The administrative assistant is responsible for making sure the front office of the school is run efficiently. They will assist the head of school with administrative tasks, be responsible for receiving and maintaining records, and other duties as needed by the head of school.

The bookkeeper is responsible for all money that goes through the school. This person will keep accurate records of the school's finances, report and advice the head of school on financial matters, and present the board with a financial statement on a monthly basis to track the school's progress.

The EC teacher will be responsible for curriculum design, similar to the classroom teacher. They are also responsible for managing cases and making sure their student's records stay in compliance.

The cafeteria employee will be responsible for creating healthful lunches. Employees will also work with teachers to provide education on nutrition and food production for the student body.

The counselor will work with students to manage emotions and behaviors at school, work with teachers to support student learning, develop relationships with families, and support students in applying for college.

The librarian will be responsible for creating and maintaining a collection of fiction and non-fiction books. They will also work with teachers to design units of instruction and teach lessons to students about how to conduct effective research.

Staff Evaluation and Professional Development

1. *Identify the positions responsible for maintaining teacher licensure requirements and professional development.*

The head of school will initially be responsible for tracking and maintaining teacher licensure requirements for the school. Support staff like instructional facilitators and/or assistant head of school may also help with these responsibilities.

2. *Provide a detailed plan noting how the school will mentor, retain, and evaluate staff in a format that matches the school's mission, educational program, and meet the teacher certification and licensure requirements for teachers as prescribed by state law and No Child Left Behind. Be sure this overview matches with the projected staff and funding of the proposed budget section.*

Eldred Montessori Secondary School - Eldred Montessori provides authentic learning experiences for passionate young adults so they can flourish in post-secondary education.

Mentor: All teachers who are hired at Eldred Montessori will be expected to have their Montessori certification or earn their Montessori certification within their first four years of working at the school. The Montessori certification through Cincinnati Montessori Teacher Education Program (CMSTEP) is a thorough and intense program that mentors their teachers while they are working towards their certification.

In addition to Montessori support, new teacher will be paired with veteran teachers on staff to support their development as professionals. We will use the New Teacher Center model for supporting new teachers. This incorporates veteran teachers working with new teachers to conduct reflections, observations, and analysis of student data. A teacher will receive mentoring their first three years of teaching and then be considered a career teacher in their fourth year of teaching.

Retention: At Eldred Montessori teacher will work in a collaborative and supportive professional environment. Earning a Montessori certification is a commitment for all levels of educators. It is two extra years of training on top of the expected teacher qualifications and it can be expected that teachers who complete this certification are committed and passionate about what they do. We will continue to nurture this passion for teaching in several ways at our school. We will offer differentiated professional development that centers around Montessori education to support our teachers in preparing students for their postsecondary careers. Experienced teachers will be encouraged to take on leadership roles as they become masters in their field. Initially teachers will attend and then report back to the faculty about what they have learned to improve the school's instruction. Further in the future of the school we will encourage teachers to become leaders in the field by presenting at local and national conferences. Whether a teacher is just starting their career or they are a veteran teacher, we will work to create a professional environment where everyone is expected to learn and grow as an educator.

Evaluate: Teachers will be evaluated using two tools, the NC Educator Effectiveness System (NCEES) and the effective Montessori teacher evaluation tool. Teachers will meet individually with administration at the beginning of the year to review their professional goals and set up a schedule for observations of the classroom. It is expected that administration will visit the classrooms frequently so that they are familiar with the teacher's practice as well as the challenges they face. Teachers will be formally observed at least twice each year. Formal observations will include a pre and post conference to make the most out of the coaching practice. During the observation sequence the teacher and administrator will reference the teacher's professional goals to ensure that they are improving as a professional. At the end of the year the administration will review goals with teachers to discuss their professional growth.

- 3. Describe the core components of professional development plan and how these components will support effective implementation of the educational program. Describe the extent to which professional development will be conducted internally or externally and will be individualized or uniform.*

The professional development plan will focus on using Montessori philosophy to support student achievement. The head of school, instructional facilitator, assistant head of school, and experienced faculty members will lead the professional development on a weekly and monthly basis.

Eldred Montessori Secondary School - Eldred Montessori provides authentic learning experiences for passionate young adults so they can flourish in post-secondary education.

Periodically we will hire CMSTEP to support our professional development plan to help us establish culture and set the foundation for our school. In addition, other outside agencies will be considered to support the school on an as needed basis.

- 4. Provide a schedule and explanation of professional development that will take place prior to school opening. Explain what will be covered during this induction period and how teachers will be prepared to deliver any unique or particularly challenging aspects of the curriculum and instructional methods.*

Once hired at Eldred Montessori teachers will be expected to participate in 16 hours of Montessori professional development. During time teachers will be introduced to Montessori philosophy and how it manifests itself in the classroom and school.

All non certified Montessori teachers will begin their training during the summer of 2018. The first year of training they will have the option of beginning a two or three year track for attaining their certification. In the two year track, teachers will participate in five weeks of professional development during the summer leading into the 2018 - 2019 school year. They will finish their training during a three week long training the following summer. If teachers choose to complete their training in three years, they will attend two weeks of training the first and second summer of their employment and then finish their third summer with three weeks of training.

Through out the school year teachers will receive professional development on how to best use Montessori philosophy to guide their instruction. Topics that could be covered include tracking student performance, designing integrated units to increase student achievement, and how to support student's emotional development to help them succeed.

- 5. Describe the expected number of days/hours for professional development throughout the school year, and explain how the school's calendar, daily schedule, and staffing structure accommodate this plan.*

Teachers will be expected to participate in professional development before the opening of school to explore the vision, mission, and goals of the school. They will also need to complete at least 30 hours of professional development yearly to support their growth. We have built early release days into the school year, one per quarter, where teachers will be expected to plan units and common assessments for the upcoming quarter. Teachers will have weekly faculty meetings where they will receive professional development that aligns with the school's goals. They will also participate in weekly department meetings where they will analyze student data and explore lesson design. The early release days have been built into the school calendar and planned in such a way that students will receive instruction for 185 days of the year. Teachers will also be encouraged to attend local, state and national conferences, either as attendant or presenter.

Enrollment and Marketing:

Reaching the full capacity for enrollment will be critical to obtain the necessary financial resources to keep your school viable and operating efficiently. In addition, it is required by law that charter schools provide equal access to all students. Read the charter school state statute regarding admissions GS 115C.218.45(a-i) carefully.

Marketing Plan

Eldred Montessori Secondary School - Eldred Montessori provides authentic learning experiences for passionate young adults so they can flourish in post-secondary education.

Marketing to potential students and parents is vital to the survival of a charter school. Provide a plan indicating how the school will market to potential students and parents in order to reasonably reflect the racial/ethnic and demographic composition of the district in which the charter school will be located or of the special population the school seeks to serve: (G.S.115C-218.45(e)).

Eldred Montessori would like to work with children that reflect the rich diversity of Durham County. We are planning for a location that is close to the Downtown area, as this will be in the center of the city. This will allow us to reach a multitude of students from different backgrounds and locations.

Eldred Montessori also wishes to reach a number of feeder schools in the area. This will allow us to avoid the issue of being tied primarily to one or two schools, only affecting those schools rather than reach the majority. This will also allow us to maintain our diversity so that it reflects that of Durham County.

Primarily, Eldred Montessori will be looking to recruit from the following neighborhoods: Holloway Street, Forest Hills, Burch Avenue, Cleveland Hills, Duke-Park, Watts-Hillandale, West Durham, Trinity, Morehead, Lakewood, East Durham, and Brightleaf.

The school will perform outreach to our target neighborhoods by attending neighborhood festivals, church services in those areas, and community and neighborhood meetings. Utilizing these locations, Eldred will share our vision with the communities we generate conversation about the educational needs of the communities.

Because Durham has a high hispanic population, we will ensure that we can have Spanish speakers at most, if not all, of our community engagement sessions.

Our proposed marketing calendar will be: September 2016 - March 2017:
Notify all interested parties, parents, social media contacts, and colleagues about the completion of the application. This will include a press release to the major publications in the area. We will continue to share Eldred Montessori's mission with the community by reaching out through churches, neighborhood events, and door-to-door conversations.

We will also begin our initial outreach through to the feeder schools that will be affected by our presence.

March 2017 - September 2017:
Update Eldred Montessori's website, notify the community of our progress. We will also begin running print ads in local newspapers and magazines, in both English and Spanish. We will begin distributing fliers to summer camps, high traffic family areas, summer events and throughout social media.

We will review those neighborhoods that seem to be showing less interest. We will make more public appearances at those neighborhoods, concentrating on public events and door-to-door conversations with the community.

We will do the same with those feeder schools that show less than normal interest. Our Board of Directors will troubleshoot with those feeder schools

Eldred Montessori Secondary School - Eldred Montessori provides authentic learning experiences for passionate young adults so they can flourish in post-secondary education.

to see what they believe is missing and what would interest them more.

September 2017 - January 2018:

We will begin taking Letters of Intent from parents. Our goal is to raise at least 50% of capacity. We recognize that this is not binding, nor does it guarantee acceptance into the program. But, it will give us a gauge to see where interest lies and where it is missing.

We will also secure interviews with local publications and news organizations to continue generating interest in our school. We will continue to develop our social media contacts, send fliers, and attend public events, particularly in the areas of interest.

January 2018 - July 2018:

Problem solve with our Board of Directors for those locations that show little interest, particularly our target neighborhoods. We will hold 2 - 3 more interviews as well as submitting press releases to all major and minor publications.

We will begin our enrollment process during this time as well, working to convert LOIs to actual enrollment applications. Our goal is to have 150% capacity by the end of this period, including a wait list that will be balanced across grade levels.

July 2018 - August 2018:

Hold a community "Ribbon Cutting Ceremony" when the space opens. Give teachers the opportunity to promote their own programs and have apparel and other gear available to purchase.

Parent and Community Involvement

- 1. Describe how you will communicate with and engage parents and community members from the time that the school is approved through opening.*
- 2. Describe how you will engage parents in the life of the public charter school. Explain the plan for building engaging partnerships between the family and school that strengthen support for student learning.*

1. People who have shown an interest in Eldred Montessori will be put on a listserv to get monthly emails about the progress of our school. We will also develop and maintain a website that will have the latest information about our school including bio's of our board members, a calendar of events, enrollment dates, and other pertinent information.

In the spring of 2018 we will have an orientation for students and families of the school. At orientation families will receive a presentation about the vision and educational plan of our school. Students will do group initiatives and interest survey's so the faculty has a better idea of who will be attending our school.

The summer before we open we will invite families to help us move into our new location by unpacking supplies and getting classrooms set up. This involvement will give families ownership of the new school. The week before school opens we will have an open house that will include a ribbon cutting for our building. Families and students will get their schedules, meet their teachers, and tour the facility.

1. There are many ways for parents to be involved in Eldred Montessori. We will have a PTSA that parents could join to help support different initiatives throughout the school. We will also have a School Improvement Team that will guide the academic goals of the school that parents could be involved in.

Parents will also be an essential components in our micro-economy and intersession experiences. We will invite parents with different skill sets to volunteer at the school to teach our students their trade skills. If the students want to make a micro-economy out of growing and selling cut flowers, they may want to invite a parent in who has experience in gardening to help them set up their soil. An older sibling who is experienced in floral arrangement could work with students to set up bunches of flowers for display. It is our belief that there is a wealth of knowledge within the families of our students and it will be our goal to integrate family members into our curriculum to better support our student's learning.

Admissions Policy

Provide the school's proposed policies and the procedures for admitting students to the proposed charter school, including:

1. *Tentative dates for the open enrollment application period; enrollment deadlines and procedures. *Please be advised schools cannot accept applications until after final approval from the SBE.*
 2. *Clear policies and procedures detailing the open enrollment lottery plan including policies regarding statutory permitted student enrollment preferences.*
 3. *Clear policies and procedures for student waiting lists, withdrawals, re-enrollment, and transfers.*
 4. *Explanation of the purpose of any pre-admission activities (if any) for students or parents.*
 5. *Clear policies and procedures for student withdraws and transfers.*
1. Open enrollment will begin October 1, 2017 and will last until February 2, 2018. Information sessions will be held throughout this time from to recruit families to the school. Information sessions and marketing materials will be offered in English and Spanish. Any application that is received after February 2, 2018 will be recorded with a date and time. The applicants name will then be placed at the end of the wait list on February 4, 2018.
2. Once an application has been received, it will be reviewed for completion and the NC address of the family will be verified. If all f the forms and information are present then the application will be assigned a random number and recorded. Special considerations will be made for the following applicants:
- Children of board members or employees of Eldred Montessori will be automatically admitted to the school.
 - Siblings of currently enrolled students of Eldred Montessori will be automatically admitted to the school.

A public lottery will be held on February 4, 2018. A random number generator will be used to select numbers assigned to applications. The first 100 numbers that are selected and then recorded for public record will be allowed to enroll. The remaining numbers will continue to be pulled at random and then recorded on the wait list until no other applicants remain. Families will be notified through mail that they have been selected for

enrollment.

To enroll at Eldred Montessori families will be invited to an orientation session that will review Montessori philosophy, pedagogy, and expectations. Sessions will be offered at varying times throughout February to ensure that all families are able to attend the sessions. After orientation families will be given their enrollment pack that will include a form to request records from the student's previous school. Families will have until March 2, 2018 to complete and turn in the enrollment packet to our offices. If the paperwork is not in at this time then the student's seat will be forfeited and another student will take that seat. If families are not able to attend one of these sessions then they will need to come to the school to receive their paperwork.

3. Students will be placed on the wait list in order based off of when their name was called from the lottery. When a seat has opened, the families will have 15 days to visit the school, participate in an orientation, and submit the necessary paperwork for enrollment. If there are no longer orientations sessions held then the parents and student will need to make an appointment with the head of school to discuss the expectations of the school and to receive the proper forms for completion.

Students who wish to withdraw from Eldred Montessori they must do so in writing. When all forms are completed and transfer requests have been received then our office staff will provide all records to the student's new school.

Students who wish to re-enroll after leaving the school must re-apply to the school and be selected through the lottery process again.

4. Families will be required to participate in an orientation before they receive their enrollment forms. During this orientation we will review Montessori philosophy, describe how it makes our classrooms different, and share with families how to support their children to help them be successful. We feel that this orientation is necessary because our school will look different than the standard high school in Durham. The more we can prepare our families, the better they will be in supporting their children while at our school.

5. See explanation 3.

Weighted Lottery

Does your school plan to use a weighted lottery?

Yes:

No:

The State Board of Education may approve an applicant's request to utilize a special weighted, or otherwise limited lottery in certain circumstances. If the charter applicant wishes to deviate in any way from the open lottery normally utilized by charter schools, the following requirements must be met:

- 1. In no event may a lottery process illegally discriminate against a student on the basis of race, religion, ethnicity, gender, or disability.*

Eldred Montessori Secondary School - Eldred Montessori provides authentic learning experiences for passionate young adults so they can flourish in post-secondary education.

2. *A lottery process may not be based upon geographic boundaries, such as zip code or current public school attendance zones.*
3. *A lottery process that deviates from the standard lottery must be based upon the school's unique mission and must be based upon educationally, psychometrically and legally sound practices, protocol and research.*

If the applicant is requesting to use a weighted, or otherwise limited, lottery, please provide the following:

1. *A thorough explanation of how the specific mission of the school, as set forth in the application, requires the utilization of the weighted or limited lottery.*

Our school wishes to provide it's students with experiences that will prepare them for the world outside of the education system. The city of Durham is a diverse and growing community and it is important to us that we reach students who represent our growing culture. Maria Montessori taught that peace only comes from grace and courtesy when people are faced with differences in their culture and her schools consistently focus on how to learn from one another to increase our understanding and goodwill towards each other. We think that living in Durham, with it's diverse population, our students have ample opportunities to learn about different types of people and cultures. It will be our goal to teach our students about cultural differences in a safe environment and empower them to go into the community to social change around stereotypes that could harm our community.

When you look at the demographics of the population of Durham that live in poverty you can see that the races or not equally represented.

White - 7,320 people
Hispanic - 12,382 people
Black - 19,500 people

<http://www.city-data.com/poverty/poverty-Durham-North-Carolina.html>

Overwhelmingly people who live in poverty are black or hispanic. In the weighted lottery we will give preference to students who are living in poverty, which should increase the amount of hispanic and black students attending our school.

There are two ways in which we will benefit our. First, it will result in a more diverse student body at Eldred Montessori. A diverse population will create rich learning experiences for our students which will better prepare our students for the real world. Second, it will benefit the talented students of Durham who are often overlooked because of their low economic status.

2. *A thorough description of the processes and procedures the applicant intends to use to effectuate the lottery.*

Families who are interested in weighted lottery will need to indicate so on their application and the provide some sort of evidence of their economic need. Typically two pay stubs or the previous year's tax forms will suffice for documentation. If for some reason a family does not have that

documentation they can arrange to speak to the Head of School to explain their case. The Head of School will then share the request with the charter board to gain admittance to the weighted lottery.

Our desire is that our student body reflect the current population of Durham. Yearly we will check the poverty rate and use that percentage to reflect how many weighted seats will be available to be filled. Currently the poverty rate is at 14% in Durham and so our weighted seat openings would be 14.

If there are fewer applicants than seats open for the school then everyone that has provided evidence will be accepted to the school. If there are more applications than seats than we will hold a separate lottery for those weighted positions. Once names have been selected for the weighted seats, the remaining applications will be returned to the general application pool for standard lottery.

3. *The underlying research, pedagogical, educational, psychometric and legal, that supports the request and the procedures the applicant is requesting.*

While having a weighted lottery is a fairly new concept, it plays a very important role in increasing the diversity of our charter schools. In an article written by Valerie Strauss for the Washington Post in 2014 she stated that, "Research on school integration going back nearly five decades has shown that students learn more, on average, in economically and racially diverse schools than in segregated learning environments. These academic results are particularly strong for low-income students" (Strauss, https://www.washingtonpost.com/news/answer-sheet/wp/2014/01/29/education-department-changes-charter-school-lottery-rules/?postshare=5101473381075529&tid=ss_mail).

When we look at the demographics of Durham we find that the poverty rate matches the rest of the country at 14%. what is more interesting is the different races that are represented within the poverty rate. In Durham, 50% of those living in poverty are black, 31% are hispanic, and 19% are white (<http://www.city-data.com/poverty/poverty-Durham-North-Carolina.html>). It is important to us that we are providing an educational environment that is diverse so that our students can learn more and be better prepared for the society they will join, which is why we have selected to do a weighted lottery with our school.

PROJECTED ENROLLMENT

2018-19 through 2022-2023

IDENTIFY LEA FROM WHICH STUDENTS WILL PROBABLY COME

LEA #1 Durham Public Schools
 LEA #2 Orange County Schools
 LEA #3

In the following tables, please list for each year and grade level, the numbers of students that the school reasonably expects to enroll. In addition, please indicate any plans to increase the grade levels offered by the school over time and be sure these figures match those on the initial cover page.

	2018-2019			2019-2020			2020-2021			2021-2022			2022-2023		
	LEA 320	LEA 680	LEA 000	LEA 320	LEA 680	LEA 000	LEA 320	LEA 680	LEA 000	LEA 320	LEA 680	LEA 000	LEA 320	LEA 680	LEA 000
Grade 09	90	10	0	90	10	0	90	10	0	90	10	0	90	10	0
Grade 10	0	0	0	90	10	0	90	10	0	90	10	0	90	10	0
Grade 11	0	0	0	0	0	0	90	10	0	90	10	0	90	10	0
Grade 12	0	0	0	0	0	0	0	0	0	90	10	0	90	10	0
	90	10		180	20		270	30		360	40		360	40	

Section IV: Governance and Capacity Concerns and Additional Questions	Reviewer	Page Reference
Not required at this time	Cande Honeycutt-Killian	Tax-Exempt S
Who will provide board the training referenced in this section? As the board adds members what other skill sets (beyond educators) will be recruited?	Kevin Piacenza	Governance a
The governing structure presented in the org chart is not clear with regard to other leadership positions and operations in the school. How will the governing board evaluate themselves? What specific PD will board have. Board does not have any members with high school, Montessori leadership, or charter school experience. Please clarify the decision to evaluate the principal using NC standards rather than Montessori leadership competencies so that Board know the s Montessori pedagogy is being implemented.	Tracy Kelley	Governance a
Small board lacks business, administrative, charter school, high school, and financial experience. What will be the strategic process to recruit board members with those skills and background? Applicant needs to provide specific examples of board training.	Cande Honeycutt-Killian	Governance a
Explain the "Distributions in Kind" listed in by-laws. What is the relationship between Geraud Staton, Laine Hindley Staton and Helen Hindley?	Sherry Reeves	Governance a
School does not have an EMO	Cande Honeycutt-Killian	Proposed Man
Counselor year 1 Proposed salary range for various positions is "large."	Sherry Reeves	Staffing Pla
The JD for teachers does not prioritize teachers with a Montessori background.	Tracy Kelley	Staffing Pla
The board of directors should make final decisions regarding grievances. Bus Driver is not mentioned in the transportation plan. The school will not have a bus, why is there a bus driver listed?	Cande Honeycutt-Killian	Staffing Pla
The PD plan does not prioritize the specific needs of HS adolescents, especially strategies for acculturation of students who will come without having been exposed to Montessori program tomorrow.	Tracy Kelley	Staff Evalua
Will school be able to attract and retain qualified teachers with the requirement for earning a Montessori certification?	Sherry Reeves	Staff Evalua
Applicant needs to be sked to provide a list of the feeder schools to be targeted to ensure that a wide range of educationally diverse students are being targeted and marketed to.	Tracy Kelley	Marketing Pl
Marketing plan is thorough but lacks specific information about the targeted feeder schools. Which schools will be considered feeders for this purpose and what is the overall demographics? How will the school ensure that this school is marketed to a diverse population of families? Durham is a highly diverse county.	Cande Honeycutt-Killian	Marketing Pl
There is a significant under appreciation in the articulation of how school will engage parents in the learning environment. Applicant needs to explore no traditional ways to engage families and parents, considering working parents, non English speakers, homes without internt connection.	Tracy Kelley	Parent and C
If a family is not able or not willing to attend the "required" orientation, will they still be allowed to enroll?	Kevin Piacenza	Admissions P
Is there a limit to the number of children of board members or employees of the school that will be admitted? (Application states that these class of students will be admitted automatically.) If children of board members and employees are automatically admitted, how can "the first 100 numbers that are selected and then recorded for public record...be allowed to enroll"? This also does not account for the 14 potential students who will be admitted based on a weighted lottery.	Sherry Reeves	Admissions P
What will happen if a family cannot make the orientation? Enrollment cannot be contingent upon attending an orientation as that may pose a barrier to enrollment for families.	Cande Honeycutt-Killian	Admissions P

Eldred Montessori Secondary School - Eldred Montessori provides authentic learning experiences for passionate young adults so they can flourish in post-secondary education.

100 students is not financially viable for a high school. It is dangerously close to the 80 student minimum. In addition, there was not sufficient evidence provided that there is a demand for this type of school.	Cande Honeycutt-Killian	Projected St
Will school be able to attract 100 9th grade students into a Montessori program? What is the 8th grade population of the targeted Montessori middle school?	Sherry Reeves	Projected St
Applicant should be asked to provide a justification for recruiting poor residents in order to reach more black and Hispanic residents. The applicant should be asked to explain why they do not do a targeted recruitment plan at majority black and Hispanic MS which means they will not need to have parents submit income data which may be potentially in violation of the law. Applicant should reflect on whether they desire a racially diverse or economically diverse student population and design a targeted recruitment plan to achieve that end rather than relying exclusively on a weighted lottery.	Tracy Kelley	Weighted Lot
School will utilize a weighted lottery (14%) based on poverty-level.	Sherry Reeves	Weighted Lot
How will the applicant ensure that the weighted lottery for low-income students is not a proxy for a race-based weighted lottery.	Steven Walker	Weighted Lot

Reviewer	Score
Robert McOuat	
Anthony Helton	Pass
Tracy Kelley	
Cande Honeycutt-Killian	Pass
Steven Walker	Pass
Avril Smart	
Glenn Allen	
Kevin Piacenza	Pass
Sherry Reeves	Pass
Tammi Sutton	
Buffy Fowler	Pass
Phyllis Gibbs	
Tracy Kelley	Fail
Deanna Townsend-Smith	

V. OPERATIONS

Transportation Plan:

Describe in detail the transportation plan that will ensure that no child is denied access to the school due to lack of transportation. The details of this plan should align with the Mission, identified need for the charter school, targeted student population, and the budget proposal.

It is predicted that 40% of our students will need transportation to school each day. There are a few things we will do ensure our students will be able to make it to school each day. First, we will ensure that our facility is in a central Durham location. We will look near highly populated areas like in downtown Durham and near Duke University. Housing our school in a centralized location should make it easier for our students to get to us each day.

Next, for families that qualify, we will offer bus passes for our students who are unable to get to school on their own. Students can ride public transportation each way for \$0.25. We will ensure that our students have bus passes that are paid for on a yearly basis.

School Lunch Plan:

Describe in detail the school lunch plan that will ensure that no child is lacking a daily meal. The details of this plan should align with the targeted student population and school budget proposal.

It is important for us that our students are well fed so that nothing stops them from acquiring their goals. To ensure that no child is hungry we will work creatively to develop a lunch plan that works for our school.

During our first year of operation we will take the money set aside for child nutrition to purchase gift cards to local grocery stores. We have chosen to purchase gift cards for our families rather than providing meals because of the uncertainty in our first year's budget. Running a full school lunch program is costly and it could be very difficult to cover the costs when we are unsure of what our budget may look like. By purchasing gift cards families will have access to money so they may purchase lunches for their children. This way no child is left hungry during the school day.

There will be an initial screening done when parents register their students for school. Students will fill out the proper documentation for free and reduced lunch. If families qualify they will be put on a biweekly payment plan to receive their grocery store credits in the mail.

As our school gets bigger and we have a more predictable budget we will begin looking at other options for providing lunch to our students. The following are options we will consider.

Option 1: We will investigate contracting our lunches through the local LEA.

Option 2: We will investigate different catering companies in the area to provide lunch for purchase at our school. We will use the same process as

described in the section that describes hiring outside vendors.

Option 3: We will begin our own school lunch program using our school's garden and local vendors. There are many programs around the state that are devoted to teaching youth how to grow, harvest, and prepare their own food. We will look at partnering with the Farm to School Coalition of NC or the Food Youth Initiative to produce local and nutritious meals for our students.

Civil Liability and Insurance (GS 115C-218.20):

The Charter School shall obtain and maintain insurance at a minimum in the following amounts:

1. Errors and omissions: one million dollars (\$1,000,000) per claim;
2. General liability: one million dollars (\$1,000,000) per occurrence;
3. Boiler and machinery: the replacement cost of the building;
4. Real and personal property: the appraised value of the building and contents;
5. Fidelity bonds: no less than two hundred fifty thousand dollars (\$250,000) to cover employee dishonesty;
6. Automobile liability: one million dollars (\$1,000,000) per occurrence; and
7. Workers' compensation: as specified by Chapter 97 of the General Statutes.

Area of proposed coverage	Proposed amount of coverage		Cost (Quote)
Comprehensive General Liability	\$1,200,000		\$2,565.00
Officers and Directors/Errors and Omissions	\$4,000,000		\$855.00
Property Insurance	\$2,500,000		\$4,400.00
Motor Vehicle Liability	\$0		\$0.00
Bonding Minimum/Maximum Amount	\$250,000	\$250,000	\$500.00
Other	\$1,250,500		\$4,400.00
Total Cost			\$12,720.00

*The applicant must provide a quote from an insurance provider as part of this application (as Appendix L) to demonstrate the levels of insurance coverage and projected cost.

Health and Safety Requirements:

All public charter schools are required to follow the regulations regarding health and safety as stated in § 115C218.75.

We, the Board members at (Charter School Name) will develop a written safety plan and policies to be shared with staff, parents and students and be available upon inspection from the Department of Public Instruction and local Health Departments.

lainestaton 08/01/2016

(Board Chair Signature) (Date)

Facility:

Eldred Montessori Secondary School - Eldred Montessori provides authentic learning experiences for passionate young adults so they can flourish in post-secondary education.

Note that the SBE may approve a charter school prior to the school's obtaining a facility; however, students may not attend school and no funds will be allocated until the school has obtained a valid Certificate of Occupancy for Educational use to the Office of Charter Schools.

What is your plan to obtain a building? Identify the steps that the board will take to acquire a facility and obtain the Educational Certificate of Occupancy.

Eldred Montessori plans to locate space in or near Downtown Durham so that the school will be able to tap into those resources of the city, as well as provide easier access to those neighborhoods that we seek to serve. We are planning on 100 students for our first year, thus we are seeking at least 10,000 sq. ft. that we can use immediately. However, it is our goal to grow into 400 students and would like a space that we could grow into that could hold approximately 30,000 sq. ft.

We are fortunate to have a strong lead on just such a building. We are looking at a building owned by the UDI Community Development Corporation, located in Downtown Durham. This location fits our needs perfectly as it is close to many of our desired neighborhoods, including Holloway Street, Forest Hills, Duke Park, and East Durham. However, we understand that the amount of time that we are discussing could bring a great deal of change so we are not limiting our search to this building.

The steps we are taking to secure our location are:

September 2016 - March 2017

For a Facilities Committee that will be made up of Board Members as well as a few influential members of the community. This will be led by one or more of the Board Members. The Committee will develop a plan, including a full timeline, for location and obtaining a space. This included further negotiation with UDI Community Development Corporation.

The facility plan must included securing the following:

- Twenty-four-hour monitoring system
- Fire/burglar system
- Separate classroom (with entry doors and windows)
- Adequate administrative suites
- A conference room
- Restrooms
- Air conditioning and heating throughout

The Committee will also be searching for temporary space in case we are unable to move into our permanent space for any reason.

March 2017 - September 2017

The Facilities Committee will identify specific locations. They will also identify funders, including Durham County and City organizations that seek to promote the development of Downtown Durham. The Committee will met with the Board monthly in order to share progress, obtain assistance as needed, and to ensure all is moving according to the plan they developed.

Eldred Montessori Secondary School - Eldred Montessori provides authentic learning experiences for passionate young adults so they can flourish in post-secondary education.

September 2017 - January 2018:

Enter into a facilities contract so that retrofitting and upgrading can begin.

January - July 2018

Vendors and suppliers will be chosen by the Facilities Committee. The Committee will also visit other schools to determine ideal arrangement of furnishing and equipment. The school will conduct open houses for the community, parents and students.

What is the breakdown of cost per square foot for the proposed facility? Outline how this cost is comparable to the commercial and educational spaces for the proposed school location.

The typical cost per square foot in Durham is \$16/ sq. ft. This will work out to be \$140,000 for the first year. Rent will rise as we utilize more space until we are using the entire 30,000 sq. ft. this will bring us to a total of \$420,000 in year 4.

Facility Contingency Plan: *Describe the method of finding a facility if the one the board has identified will not be ready by the time the public charter school will be opening. Include information regarding the immediate spatial needs of the school and identify any programs that will not be immediately offered because a permanent facility has yet to open.*

Our Facilities Committee will be working on alternative locations from the very beginning. We understand that we have two years before the school will be up and running, and that things can change. Part of our Facilities Committee's mandate will be locating multiple options for Eldred Montessori.

This search will include temporary space that may be used for the first year or two. We will concentrate on space for classrooms. If needed we will be able to forego some of the extracurricular programs such as access to computers and a library. In addition we can look at obtaining smaller spaces where there are only enough classrooms for the classes that are currently being taught, approximately four per grade level. This means that teachers will need to share classrooms and use an office space to do their planning.

We will also consider looking at other locations in the area that may be less expensive than the downtown area of Durham. We were hoping for a location that would be central to all of the families in the city, but if our plans fall through we will consider all options. If we do look at another building that is more on the outskirts of Durham, we will make sure that it is near a bus line so that our students would still have transportation to and from school.

Section V: Operations Concerns and Additional Questions	Reviewer	Page Reference
How will transportation be provided for students with disabilities if it is outlined in an IEP as a related service?	Glenn Allen	Transportati
In staffing section, there is a salary for a bus driver. But there isn't a plan to have a	Cande Honeycutt-	Transportati

Eldred Montessori Secondary School - Eldred Montessori provides authentic learning experiences for passionate young adults so they can flourish in post-secondary education.

bus. What criteria will be used to determine if students would qualify for bus passes? How will transportation for students with an IEP that requires transportation be handled? What happens if the school cannot find a suitable location within the targeted area?	Killian	
What criteria will be used to "qualify" students for bus passes? What accommodations will be made for students who don't live near a public bus route?	Kevin Piacenza	Transportati
A bus pass is the plan but I saw a salary for a Bus Driver. Please explain.	Anthony Helton	Transportati
Transportation plan lacks details. Why was a bus driver included in the projected staffing with a \$30,000 salary if the plan is to utilize bus passes? How does a student qualify for a bus pass?	Sherry Reeves	Transportati
If a student receives a grocery gift card and still does not come to school with lunch, how will the school respond? "We will investigate contracting our lunches through the local LEA"- Can the applicant clarify this arrangement? How ould the logistics be handled?	Kevin Piacenza	School Lunch
Innovative idea, but how does this ensure that no child lacks a daily meal?	Steven Walker	School Lunch
Gift cards will no ensure student have lunch--plan lacks intentionallity.	Tracy Kelley	School Lunch
How will the school ensure that no student is without a lunch? What will happen if a student receives a grocery card and still doesn't bring in lunch? What will be the process for any child coming to school without a lunch? Has the school had any preliminary discussions with the LEA to determine if Option 1 is viable? What about the logistics of transporting and serving meals?	Cande Honeycutt-Killian	School Lunch
What amount will be allotted on the monthly gift card for lunches? How will school determine who is eligible for gift card program?	Sherry Reeves	School Lunch
Note that the facility will be ADA compliant to meet the needs of those with disabilities.	Glenn Allen	Facility and
How could a high school be competitive without technology in the first two years of operation?	Cande Honeycutt-Killian	Facility and
Is it reasonable to forego technology the first two years of high school?	Buffy Fowler	Facility and

Reviewer	Score
Tracy Kelley	
Steven Walker	Pass
Tracy Kelley	Pass
Tammi Sutton	
Sherry Reeves	Fail
Buffy Fowler	Pass
Anthony Helton	Pass
Deanna Townsend-Smith	
Cande Honeycutt-Killian	Pass
Kevin Piacenza	Pass
Phyllis Gibbs	
Glenn Allen	
Avril Smart	
Robert McOuat	

VI. FINANCIAL PLAN

In the following sections present a detailed description of assumptions and revenue estimates, including but not limited to the basis for revenue projections, staffing levels, and costs. The narrative should specifically address the degree to which the school budget will rely on variable income.

Budget: Revenue Projections from each LEA 2018-19

**SHOW
CALCULATIONS
FOR FIGURING
STATE
AND LOCAL
DOLLARS
FOR THE
PROPOSED
CHARTER
SCHOOL**

*Refer to the
Resource Manual
Finance Section
for guidance on
estimated funding
amounts*

State Funds: Charter schools receive an equivalent amount per student as the local education agency (LEA) receives per student receives from the State. Funding is based on the 1st month average daily membership.

- In year 1 – Base state allotments are determined by the LEA in which the student resides
- In year 2 and beyond- Base State allotments are determined by the LEA in which the school is located.

Local Funds: Charter schools receive a per pupil share of the local current expense of the LEA in which the student resides.

Federal Funds: Charter schools must qualify and apply for the individual federal grants based on their population of students.

REFER TO RESOURCE GUIDE FOR ADDITIONAL INFORMATION AND SOURCE DOCUMENTS

LEA #1 320 - Durham Public Schools

Revenue	2016-2017 Per Pupil Funding	Projected LEA ADM	Approximate funding for 2018-2019
State Funds	\$5,095.09	90	\$458,558.10
Local Funds	\$3,132.52	90	\$281,926.80
Federal EC Funds	\$3,579.70	5	\$17,898.50
Totals			\$758,383.40

LEA #2 680 - Orange County Schools

Revenue	2016-2017 Per Pupil Funding	Projected LEA ADM	Approximate funding for 2018-2019
State Funds	\$5,236.16	10	\$52,361.60
Local Funds	\$3,612.00	10	\$36,120.00
Federal EC Funds	\$3,005.37	0	\$0.00
Totals			\$88,481.60

Total Budget: Revenue Projections 2018-19 through 2022-2023

INCOME: REVENUE PROJECTIONS	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023
-State ADM Funds	\$477,502	\$955,004	\$1,432,506	\$1,910,008	\$1,910,008
-Local Per Pupil Funds	\$318,047	\$636,094	\$954,141	\$1,272,188	\$1,272,188
-Exceptional Children Federal Funds	\$18,841	\$37,682	\$56,523	\$75,364	\$75,364
-Other Funds*	\$0	\$0	\$0	\$0	\$0
-Working Capital*	\$0	\$0	\$0	\$0	\$0
Z - TOTAL REVENUE	\$814,390	\$1,628,780	\$2,443,170	\$3,257,560	\$3,257,560

***If the applicant is depending on other funding sources or working capital to balance the operating budget, please provide documentation such as signed statements from donors, foundations, bank documents, etc., on the commitment of these funds. If these figures are loans, the repayment needs to be explained in the narrative and found within the budget projections.**

Assurances are needed to confirm the commitment of these additional sources of revenue. Please include these as Appendix J.

Personnel Budget: Expenditure Projections 2018-19 through 2022-2023

The personnel list below may be amended to meet the staffing of individual charter schools: This list should align with the projected staff located in the Operations Plan.

BUDGET EXPENDITURE PROJECTIONS Personnel	2018-2019			2019-2020			2020-2021			2021-2022			2022-2023		
	Num Staff	Avg Salary	Total salary	FTE	Avg Salary	Total salary	FTE	Avg Salary	Total salary	FTE	Avg Salary	Total salary	FTE	Avg Salary	Total salary
Administrative & Support Personnel:															
Lead Administrator	1	\$55,000	\$55,000	1	\$56,487	\$56,487	1	\$57,617	\$57,617	1	\$58,769	\$58,769	1	\$59,945	\$59,945
Finance Officer	1	\$30,000	\$30,000	1	\$30,600	\$30,600	1	\$31,212	\$31,212	1	\$31,836	\$31,836	1	\$32,472	\$32,472
Clerical	1	\$25,000	\$25,000	1	\$25,500	\$25,500	1	\$26,010	\$26,010	1	\$26,530	\$26,530	1	\$27,060	\$27,060
Food Service Staff	0	\$0	\$0	0	\$30,000	\$0	0	\$30,000	\$0	0	\$30,000	\$0	0	\$30,000	\$0
Guidance Counselor	0	\$0	\$0	1	\$40,000	\$40,000	1	\$40,800	\$40,800	1	\$41,616	\$41,616	1	\$42,448	\$42,448
Assistant Administrator	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	1	\$47,616	\$47,616	1	\$48,568	\$48,568
A - Total Admin and Support:	3		\$110,000	4		\$152,587	4		\$155,639	5		\$206,367	5		\$210,493
Instructional Personnel:															
Core Content Teacher(s)	4	\$40,000	\$160,000	8	\$40,800	\$326,400	12	\$43,696	\$524,352	16	\$44,570	\$713,120	16	\$45,462	\$727,392
Electives/Specialty Teacher(s)	2	\$40,000	\$80,000	4	\$40,800	\$163,200	6	\$43,696	\$262,176	8	\$44,570	\$356,560	8	\$45,462	\$363,696
Exceptional Children Teacher(s)	1	\$40,000	\$40,000	1	\$40,800	\$40,800	1.5	\$43,696	\$65,544	1.5	\$44,570	\$66,855	1.5	\$45,462	\$68,193
Instructional Support	0	\$0	\$0	0	\$0	\$0	1	\$0	\$0	1	\$0	\$0	1	\$0	\$0
Teacher Assistants	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
B - Total Instructional Personnel:	7		\$280,000	13		\$530,400	20.5		\$852,072	26.5		\$1,136,535	26.5		\$1,159,281

Eldred Montessori Secondary School - Eldred Montessori provides authentic learning experiences for passionate young adults so they can flourish in post-secondary education.

A+B = C - Total Admin, Support and Instructional Personnel:	10		\$390,000	17		\$682,987	24.5		\$1,007,711	31.5		\$1,342,902	31.5		\$1,369,774
Administrative & Support Benefits															
Health Insurance	3	\$5,568	\$16,704	4	\$5,568	\$22,272	4	\$5,568	\$22,272	5	\$5,568	\$27,840	5	\$5,568	\$27,840
Retirement Plan--NC State	3	\$6,400	\$19,200	4	\$6,528	\$26,112	4	\$6,658	\$26,632	5	\$6,791	\$33,955	5	\$6,927	\$34,635
Retirement Plan--Other	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Life Insurance	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Disability	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Medicare	3	\$382	\$1,146	4	\$368	\$1,472	4	\$352	\$1,408	5	\$353	\$1,765	5	\$0	\$0
Social Security	3	\$2,369	\$7,107	4	\$2,210	\$8,840	4	\$2,113	\$8,452	5	\$2,119	\$10,595	5	\$0	\$0
Dental	3	\$300	\$900	4	\$300	\$1,200	4	\$300	\$1,200	5	\$300	\$1,500	5	\$300	\$1,500
D - Total Admin and Support Benefits:	15		\$45,057	20		\$59,896	20		\$59,964	25		\$75,655	25		\$63,975
Instructional Personnel Benefits:															
Health Insurance	7	\$3,600	\$25,200	13	\$3,600	\$46,800	20.5	\$3,600	\$73,800	26.5	\$3,600	\$95,400	26.5	\$3,600	\$95,400
Dental	7	\$300	\$2,100	13	\$300	\$3,900	20.5	\$300	\$6,150	26.5	\$300	\$7,950	26.5	\$300	\$7,950
Retirement Plan--NC State	7	\$873	\$6,111	13	\$873	\$11,349	20.5	\$873	\$17,897	26.5	\$873	\$23,135	26.5	\$873	\$23,135
Social Security	7	\$2,235	\$15,645	13	\$2,235	\$29,055	20.5	\$2,235	\$45,818	26.5	\$2,235	\$59,228	26.5	\$2,235	\$59,228
Medicare	7	\$372	\$2,604	13	\$372	\$4,836	20.5	\$372	\$7,626	26.5	\$372	\$9,858	26.5	\$37	\$981
E - Total Instructional Personnel Benefits:	35		\$51,660	65		\$95,940	102.5		\$151,290	132.5		\$195,570	132.5		\$186,693
D+E = F - Total Personnel Benefits	50		\$96,717	85		\$155,836	122.5		\$211,254	157.5		\$271,225	157.5		\$250,668
A+D = G - Total Admin and Support Personnel (Salary & Benefits)	18		\$155,057	24		\$212,483	24		\$215,603	30		\$282,022	30		\$274,468
B+E = H - Total Instructional Personnel (Salary & Benefits)	42		\$331,660	78		\$626,340	123		\$1,003,362	159		\$1,332,105	159		\$1,345,974

Eldred Montessori Secondary School - Eldred Montessori provides authentic learning experiences for passionate young adults so they can flourish in post-secondary education.

G+H = J - TOTAL PERSONNEL	60		\$486,717	102		\$838,823	147		\$1,218,965	189		\$1,614,127	189		\$1,620,442
---------------------------	----	--	-----------	-----	--	-----------	-----	--	-------------	-----	--	-------------	-----	--	-------------

Operations Budget: Expenditure Projections
2018-19 through 2022-2023

BUDGET OPERATIONS EXPENDITURE PROJECTIONS		2018-2019	2019-2020	2020-2021	2021-2022	2022-2023
	Administrative & Support:					
Office:	Office Supplies	\$15,000	\$18,000	\$21,000	\$24,000	\$24,000
	Paper	\$3,000	\$6,000	\$9,000	\$12,000	\$12,000
	Computers & Software	\$0	\$10,000	\$10,000	\$10,000	\$10,000
	Communications & Telephone	\$900	\$420	\$420	\$420	\$420
	Copier leases	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000
Management Company	Contract Fees	\$0	\$0	\$0	\$0	\$0
Professional Contract	Legal Counsel	\$7,000	\$7,000	\$7,000	\$7,000	\$7,000
	Student Accounting	\$0	\$0	\$0	\$0	\$0
	Financial	\$1,000	\$2,500	\$5,000	\$5,000	\$5,000
	Other Professional	\$0	\$0	\$0	\$0	\$0
Facilities	Facility Lease/Mortgage	\$105,000	\$210,000	\$315,000	\$420,000	\$420,000
	Maintenance	\$5,000	\$10,000	\$15,000	\$20,000	\$20,000
	Custodial Supplies	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000
	Custodial Contract	\$11,000	\$22,000	\$33,000	\$44,000	\$44,000
	Insurance (pg19)	\$0	\$0	\$0	\$0	\$0
	Other	\$0	\$10,000	\$15,000	\$20,000	\$20,000
Utilities	Electric	\$33	\$66	\$100	\$133	\$133
	Gas	\$0	\$0	\$0	\$0	\$0
	Water/Sewer	\$33	\$66	\$100	\$133	\$133
	Trash	\$33	\$66	\$100	\$133	\$133
Transportation	Buses	\$3,800	\$7,600	\$11,400	\$15,200	\$15,200
	Gas	\$0	\$0	\$0	\$0	\$0
	Oil/Tires & Maintenance	\$0	\$0	\$0	\$0	\$0
Other	Marketing	\$1,000	\$5,000	\$7,000	\$10,000	\$10,000
	Child nutrition	\$21,682	\$43,364	\$65,046	\$86,728	\$86,728
	Travel	\$0	\$0	\$0	\$0	\$0
	Other	\$0	\$0	\$0	\$0	\$0
	K - TOTAL Administrative & Support Operations	\$180,481	\$358,082	\$520,166	\$680,747	\$680,747
	Instructional:					
Instructional Contract	Staff Development	\$24,000	\$56,000	\$56,000	\$56,000	\$56,000
Classroom Technology	Software	\$0	\$0	\$0	\$0	\$0

Eldred Montessori Secondary School - Eldred Montessori provides authentic learning experiences for passionate young adults so they can flourish in post-secondary education.

Books and Supplies	Instructional Materials	\$50,000	\$70,000	\$90,000	\$110,000	\$110,000
	Curriculum/Texts	\$0	\$0	\$0	\$0	\$0
	Copy Paper	\$0	\$0	\$0	\$0	\$0
	Testing Supplies	\$0	\$0	\$0	\$0	\$0
	Other	\$0	\$0	\$0	\$0	\$0
	L - TOTAL Instructional Operations	\$74,000	\$126,000	\$146,000	\$166,000	\$166,000
	K+L = M - TOTAL OPERATIONS	\$254,481	\$484,082	\$666,166	\$846,747	\$846,747

Eldred Montessori Secondary School - Eldred Montessori provides authentic learning experiences for passionate young adults so they can flourish in post-secondary education.

Overall Budget:

BUDGET OPERATIONS EXPENDITURE PROJECTIONS	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023
J - TOTAL PERSONNEL	\$486,717	\$838,823	\$1,218,965	\$1,614,127	\$1,620,442
M - TOTAL OPERATIONS	\$254,481	\$484,082	\$666,166	\$846,747	\$846,747
J+ M =N TOTAL EXPENDITURES	\$741,198	\$1,322,905	\$1,885,131	\$2,460,874	\$2,467,189
Z - TOTAL REVENUE	\$814,390	\$1,628,780	\$2,443,170	\$3,257,560	\$3,257,560
Z - N = SURPLUS / (DEFICIT)	\$73,192	\$305,875	\$558,039	\$796,686	\$790,372

Budget Narrative: (No more than one and a half pages)

Please include additional information that showcases all assumptions for your budgetary calculations.

1. *How was the student enrollment number projected?*

Provide an explanation as to why you believe there is a demand for the school that will meet this enrollment projection.

Provide the break-even point of student enrollment.

The student enrollment number was projected using the information we have about the Montessori middle schools that are in the area. The current Montessori middle school in Durham graduates approximately 100 students every year from eighth grade. There is a wait list for this Montessori school so there could be well over 100 students who are looking for a Montessori environment for their high school education.

We've included Orange County in our student enrollment prediction because there are Montessori schools in Orange County. Orange County is neighboring Durham and we could get some families from this area.

Every year students from Lakewood Montessori Middle School are challenged with finding a high school that meets their needs. They are placed in one of the five large high schools that Durham Public Schools offers, but the majority of students tour and apply for the magnet schools that Durham offers. The small size and specialized instruction is very attractive to families who have attended a Montessori school. Many of Lakewood's students are accepted to magnet schools, charter schools, or private school in the area. We feel that by offering a Montessori high school we will be filling the need families have to send their child to a small and specialized school. Having a school that focuses on character building and social responsibility will draw families to our school. Families will not have to send their children to a very specialized school that focuses on medicine or engineering just to get a small school for their children to attend.

We need to have 91 students enrolled our first year to break even.

Discuss the school's contingency plan to meet financial needs if anticipated revenues are not received or are lower than estimated.

While our budget has been carefully balanced to ensure that we are able to stay within our budget, the first years of a charter school are uncertain and there may be situations where our revenue can not cover our expenditures. If this situation were to occur we will consider the following options to make sure we stay within budget.

Eldred Montessori Secondary School - Eldred Montessori provides authentic learning experiences for passionate young adults so they can flourish in post-secondary education.

Reassess staffing needs: If our enrollment drops it will have an impact on the amount of money we receive. The first thing we need to consider is how many teacher we will need if our enrollment is low. Reducing our faculty size would help to balance our budget.

Alter the training projects for teachers: Paying for teacher to become Montessori certified is a large part of our budget. If we find ourselves in a situation where our budget is in deficit we will reconsider how quickly we will send our faculty through training. Potentially only half of the teachers could go through training the first year, which could make a difference in the budget.

Does the budget rely on sources of funds other than state, county, and federal (e.g. loans, donations etc.? If so, please provide the source and amount. Be sure that the appropriate assurances documentation is provided in the appendices

No, our funding does not rely on outside sources.

Provide the student to teacher ratio that the budget is built on.

1:25

- 2. Does the school intend to contract for services such as student accounting and financial services, exceptional children instructional support, custodial etc. Describe the criteria and procedures for the selection of contractors and large purchases.*

There are a few services we will consider using contractors for at the beginning of the school.

Custodial services: We will use an outside source because they will have the supplies necessary to maintain the facility.

Marketing services: It will be important to build a public image as soon as our school approved so that we will be able to make our enrollment projects. We will hire an independent contractor to design a marketing plan for us that will include, but will not be limited to advertising, website maintenance, and school branding.

Accounting services: While we have budgeted for a bookkeeper at our school, we may find that hiring a CPA to manage our finance may be a more efficient at the opening of our school.

We will use the following criteria when considering the use of an outside contractor for services.

We will consider at least three vendors before a final decision is made as to who will work with the school.

We will look at the reputation of the vendor, consulting referrals when available to speak to their quality of work.

Their service record will be required as part of their proposal to give us a better idea of what type of work they do.

Priority will be given to vendors who have worked with schools in the past.

3. *Explain how the budget aligns with the school's mission, curricular offerings, transportation plans, and facility needs.*

The budget is prioritized so that we can provide our students and faculty in ways consistent with our Montessori principles. Because a Montessori teacher is meant to craft engaging and thought provoking units, particularly a holistic approach as defined by Maria Montessori, the School needs to have specially trained teachers. To this end, our budget concentrates on hiring well qualified teachers with competitive salaries and benefits, as well as training those teachers so that they can serve our students better. The students will also have access to multiple electives.

4. *What percentage of expenditures will be the school's goal for a general fund balance? Describe how the school will develop the fund balance.*

The percentage will change each year. Our goal is to create a surplus equal to three months of expenses by the end of 4 years. The total comes to \$571,330. We also wish to operation in the positive every year. This is highly important to us.

5. *Provide a description of proposed financing structure. Include financing of facilities, other asset financing and leases.*

Fifteen percent of our budget will be devoted to the facility.

Seventy percent of our budget will be devoted towards recruitment, hiring, and developing quality teachers.

Seven percent of our budget will be devoted to operations.

7. *Will the school have assets from other sources (e.g. building, furniture, chairs, computers, etc.)? If yes, please provide a list. Note which are secured and which are anticipated, and include evidence of commitment for any assets on which the school's core operation depends*

We will not have assets from other sources.

Financial Compliance: (No more than a half of a page)

How will the school ensure adequate internal controls, including segregation of duties, safeguarding of assets, accurate and adequate recording keeping?

We have a number of procedures in place to ensure that our keeping accurate records, maintaining internal controls, and making sure all duties are being met by those responsible for them.

- We will be hiring a bookkeeper to keep track of all financial records, which will also be audited each year.
- Our Governance Committee will be responsible for overseeing our staffing needs, particularly those of our administrative team. The School also has a list of positions and their responsibilities, noted in this application.
- The School will have an independent auditor that will review records on a regular basis.

Provide any known or possible related party transactions (relationship, description of transaction and estimated dollars involved)

Not applicable. We will not have any related party transactions.

Provide the name and contact information of the independent audit firm who will conduct the annual financial statement audit. If a firm has yet to be identified please list the firms the board has investigated.

Leslie Merritt, CPA, PC
1014 N. Arendell Avenue
Zebulon, NC 27597
Office: (919) 269-8553
Fax: (919) 269-8551
mycpa@lesmerrittcpa-cfp.com

Section VI: Financial Plan Concerns and Additional Questions	Reviewer	Page Reference
Why is there a prediction of only 5% of the population being special ed?	Buffy Fowler	Budget Reven
Concerns that 100 students for a first year is not sufficient for a viable high school.	Cande Honeycutt-Killian	Budget Reven
EC estimate may be a little low. State average is closer to 13% if I remember correctly.	Steven Walker	Budget Reven
Bus driver appears in proposed staffing but not in transportation plan and this budget. Applicant needs to clarify discrepancy between the benefits coverage for administration and instructional staff especially since both are being offered state retirement.	Cande Honeycutt-Killian	Personnel Bu
Staffing projection in Governance section lists a cafeteria employee, bus driver, guidance counselor and librarian but budget does not include any of these positions in year 1. Most of these positions are not listed in years 1-5.	Sherry Reeves	Personnel Bu
Can the applicant clarify the cost per difference between instructional and admin staff for health insurance and retirement?	Kevin Piacenza	Personnel Bu
Financial is way too low to receive an audit. Facility cost seems low. Electric, etc. for \$33 a year? Marketing budget is basically nonexistent.	Steven Walker	Operations B
Copier lease appears to be low. Facility costs is more than described in facilities section. Explain extremely low utilities cost.	Buffy Fowler	Operations B
Have funds been budgeted for related services as outline in a child's IEP? (OT, PT, Speech, Psychological Services etc)	Glenn Allen	Operations B
Can the applicant clarify \$0 for admin computers and software, student accounting (ISIS), utilities, classroom technology, and other instructional supplies? Where is furniture in budget? Will the school be contacting for any special education services; speech, audiology, psychological testing, etc.?	Kevin Piacenza	Operations B
No computer for office in year 1. Copier lease is almost nonexistent as well as communications/telephone. \$0 for insurance years 1-5. Explain utilities costs. Why is marketing \$1000 in year 1 but \$10,000 in year 5? No classroom technology in years 1-5. \$0 budgeted for curriculum/texts, copy paper, and testing supplies. Are these costs incorporated into instructional materials?	Sherry Reeves	Operations B
Many budget concerns. Costs are very low for all things facilities. Marketing is low for a specialized school.	Anthony Helton	Operations B
There is no budget for computers for office staff or instructional purposes. How will the school meet the requirements of utilizing PowerSchool/HomeBase, test coordination, general budgeting and accounting, etc. if there is no computers or software budgeted? Personal equipment should not have sensitive student information on it. Where are the funds budgeted for EC-related services such as speech, OT, PT, etc.?	Cande Honeycutt-Killian	Operations B
Can the applicant clarify the Operations Budget so that total expenditures are realistic?	Kevin Piacenza	Total Expend
First year surplus is not sufficient to cover the deficiencies in the operations budget or if the school is unable to meet projected enrollment.	Cande Honeycutt-Killian	Total Expend
Although a surplus is shown for all 5 years, there are many "holes" in the budget that may actually deduct from these surpluses.	Sherry Reeves	Total Expend
What will be the cost of hiring a CPA?	Cande Honeycutt-Killian	Budget Narra

Eldred Montessori Secondary School - Eldred Montessori provides authentic learning experiences for passionate young adults so they can flourish in post-secondary education.

Again, there is no mention of EC-related services. How will the school ensure IEPs are met?		
"Every year students from Lakewood Montessori Middle School are challenged with finding a high school that meets their needs"-Is the applicant expecting the school will mostly serve students from Lakewood Middle School? Will the "bookkeeper" handle student accounting, payroll, benefits management, and accounting, budget management? Will any of these tasks be contracted out? Can the school adequately serve EC students without contracting for needed services?	Kevin Piacenza	Budget Narra
There is no articulation of the internal controls that will be used. Applicant should be asked about the specific safeguards that will be put in place.	Tracy Kelley	Financial Au
The process for internal controls for financing are vague. Applicant needs to provide a more detailed plan to ensure the financial health of the school especially in light of the concerns expressed in the budgeting sections.	Cande Honeycutt-Killian	Financial Au

Reviewer	Score
Buffy Fowler	Pass
Glenn Allen	
Tammi Sutton	
Deanna Townsend-Smith	
Phyllis Gibbs	
Sherry Reeves	Fail
Tracy Kelley	
Tracy Kelley	Fail
Avril Smart	
Cande Honeycutt-Killian	Fail
Steven Walker	Fail
Robert McOuat	
Kevin Piacenza	Pass
Anthony Helton	Fail

VII AGREEMENT PAGE

Application Fee:

Pursuant to § 115C-218.1(c) the charter school applicant must submit a \$1000 application fee to the Office of Charter Schools. The applicant must submit their application fee by the September 19, 2016 5:00 pm EST deadline. Payments will be accepted in the form of a check or credit card. The Credit card Form is found on the Office of Charter Schools website. Cash is not accepted.

**Application Note: The applicant must mail the check or credit card form along with a letter indicating the name of the proposed charter school, contact information, and the enclosed payment amount to be received before or on the due date of September 19, 2016 5:00 pm EST. Failure to submit payment by the stipulated timeline to the Office of Charter Schools will deem the application incomplete.*

Payments should be made payable to North Carolina Department of Public Instruction

*North Carolina Department of Public Instruction
Office Of Charter Schools
6303 Mail Service Center
Raleigh, NC 27699-6303*

I understand the requirements pursuant to G.S. 115C-218.1(c).

lainestaton

Date: 09/19/2016

Applicant Signature:

The foregoing application is submitted on behalf of Eldred Montessori Secondary School (*name of non-profit corporation or individuals submitting application*). The undersigned has read the application and hereby declares that the information contained in it is true and accurate to the best of his/her information and belief. The undersigned further represents that the applicant has read the Charter School Law and agrees to be governed by it, other applicable laws, and SBE regulations. Additionally, we understand the final approval of the charter is contingent upon successful completion of a mandatory planning year. Per SBE policy TCS-U-013 All new nonprofit boards receiving a charter must participate in a year-long planning program prior to the charter school's opening for students. The planning year provides an applicant time to prepare for the implementation of the school's curricular, financial, marketing, and facility plans. During this planning year, regular meetings are held with the Board of Directors and consultants from the Office of Charter Schools to provide information on the following topics: school opening plans, staff development, finance, governance, board training, marketing, policies and procedures, securing a school site, and hiring a school administrator. Final approval of the charter will be contingent upon successfully completing all of the planning program requirements.

Print/Type Name: lainestaton

Board Position: Laine Marie Staton

Signature: _____

Date: 09/19/2016

Sworn to and subscribed before me this
_____ day of _____, 20____.

Notary Public

Official Seal

Eldred Montessori Secondary School - Eldred Montessori provides authentic learning experiences for passionate young adults so they can flourish in post-secondary education.

My commission expires: _____, 20_____.

OVERALL ASSESSMENT

Would you, as an external evaluator, recommend an interview for this application? Remember that an external evaluator has no authority to bind the Advisory Board to a particular recommendation. This rubric, and the following recommendation, is simply a starting point for subcommittee and Advisory Board deliberations regarding which applicants to invite back for an interview.

<u>Total External Evaluator Votes</u>	
No	Yes

Would you, as a subcommittee, recommend an interview for this application? Remember that a subcommittee is not a quorum of the whole Advisory Board and has no authority to bind the Advisory Board to a particular recommendation. This rubric, and the following recommendation, is simply a starting point for Advisory Board deliberations regarding which applicants to invite back for an interview.

<u>Total Subcommittee Votes</u>	
No	Yes

Would you, as an Advisory Board, recommend this nonprofit group to the SBE to start the Planning year? The State Board of Education gives the final approval to start the Planning Year.

<u>CSAB Votes</u>	
No	Yes

Summary comments are to be provided in the appropriate section detailing the findings and/or concerns of the Public Charter School Advisory Council subcommittee.

Initial Screening

Mission, Purposes, and Goals	- theltoncsab
Education Plan	- theltoncsab
Governance and Capacity	- theltoncsab
Operations	Is there a basis for the gift card for lunch? What is the amount? Will it fully cover all lunches? - theltoncsab
Financial Plan	- theltoncsab
OVERALL	- dtsmith840 - sherryreeves - sherryreeves

External Evaluator

Mission, Purposes, and Goals	<p><u>Mission Statement</u> Can the mission statement be revised to strengthen the school's academic rigor beyond "authentic learning experiences"? - kpiacenza</p> <p><u>Educational Need and Targeted Student Population</u> Do the survey results (35 out 89 requesting more information) demonstrate need for a Montessori high school in the target location?</p> <p>Can the applicant cite evidence beyond Appendix A1 that a Montessori high school program would be an attractive alternative for students with low academic achievement history? How will the proposed program's unique qualities produce different outcomes for the target population? - kpiacenza</p> <p><u>Educational Need and Targeted Student Population</u> What are the demographics of the students in the other Montessori schools in Durham? - buffy_fowler</p> <p><u>Educational Need and Targeted Student Population</u> Applicant should be asked whether the other 3 Montessori ES and MS are charters, private schools.</p> <p>The rationale for the school, as presented, is not compelling and does not sufficiently speak to whether there is researched-based evidence that a Montessori HS will adequately meet the needs of students who have not come from a Montessori MS or ES. Is there a school with similar student populations that has been successful in another state? The applicant team provides substantially no evidence supporting this school model. The link for surveys was broken. Does applicant intend to make its target population students from Montessori MS or will it recruit from other middle schools within the LEA? - kellestracy</p>
-------------------------------------	---

Educational Need and Targeted Student Population

Do you have additional evidence of educational need beyond the surveys? 35 of 89 responses indicated interest. This is not sufficient evidence for a school with already low projected enrollment numbers.

Applicant needs to provide further clarification on how a Montessori high school would meet the needs of the students in Durham County. Are the currently operating Montessori schools public, private or charter? What research backs up the efficacy of the Montessori model for high school students? - cande_honeycuttk

Educational Need and Targeted Student Population

Attached for review purposes is a map outlining the current charter schools. Additionally, the map provides an overview of the general placement of proposed charter schools for the 2018 school year: <http://www.dpi.state.nc.us/charterschools/schools/map>. - dtsmith840

Educational Need and Targeted Student Population

Small number of respondents to survey. Can school enroll 100 ninth graders in year 1? - sherryreeves

Purposes of Proposed Charter School

"Eldred Montessori will concentrate on how to develop responsible and competent learners, which is unique to other secondary alternative offerings"- Can the applicant clarify this statement? Are you saying this is not happening at any schools in the LEA? - kpiacenza

Purposes of Proposed Charter School

There is no particular focus on improving student outcomes despite having chosen 3 purposes. While applicant speaks about different learning environments it does not make the connection from different to better, especially with regard to serving at risk students. - kelleytracy

Purposes of Proposed Charter School

Applicant needs to expand upon how this model will improve student outcomes. - cande_honeycuttk

Purposes of Proposed Charter School

It seems to me that the surveys show insufficient evidence for the school. I'd like to here why they think the interest is there. - theltoncsab

Goals for the Proposed Charter School

Is Goal 1 to score higher than state after 5 years or score higher than 60%? Can the applicant clarify the academic goal so that it more specific with respect to time, growth, and outcomes? - kpiacenza

Goals for the Proposed Charter School

While school aims to out perform the state goals, the proposed goal of 60% does not evidence high expectations for student learning or teaching. Academic goals are not time bound and are not projected 5 years. Applicant doe snot identify interim or benchmark assessment that it will use to progress monitor toward state proficiency, additionally there are not operations goals that are aligned with mission to track internships, portfolio demonstrations of learning, teacher retention rates, student retention rate, parent satisfaction, or Montessori specific indicators or standards etc. Future ready goals to not identify a metric and Goal 3 under leadership is not SMART at all. There are no metrics or structures, or process for how the Board will monitor the schools progress because the

	<p>methods are incomplete and lacking adequate metrics or measures. - kellestracy</p> <p><u>Goals for the Proposed Charter School</u> Academic goals does not address the current scores of Durham County students (that would be a baseline). It is unclear if the goal is to surpass state average or to score at least 60%. What is the goal and what existing evidence supports that this goal is attainable? What formative assessments will be used during the academic year to ensure the school is progressing?</p> <p>It is unclear how a transitioning board will ensure financial viability. - cande_honeycuttk</p> <p><u>Goals for the Proposed Charter School</u> Goal 3 explanation of transitioning board from start board to a governing board is confusing. What is the targeted population? Current middle-school Montessori students in Durham? Academic goals are not lofty. Will school be able to attract and retain teachers if a 2-year graduate program is required? - sherryreeves</p> <p><u>Goals for the Proposed Charter School</u> Goals seem a little low to me. - dswalker</p> <p><u>Goals for the Proposed Charter School</u> Higher goals seem to be needed. - theltoncsab</p>
<p>Education Plan</p>	<p><u>Instructional Program</u> Can the applicant describe a "integrative project" with respect to content and high school course work?</p> <p>Can the applicant clarify the origin and nature of the "common assessments" referred to in this section?</p> <p>Can the applicant cite existing high school Montessori programs and their effectiveness with similar target populations? - kpiacenza</p> <p><u>Instructional Program</u> The applicant provides very little information about the actual instructional methods and instructional program outside of real world work options. There is not researched based data to support that the HS Montessori approach will be successful with the targeted population of Durham or that school will be able to attract the diverse student population outlined in the mission section. How will the instructional strategies reengage disengaged adolescents/ This is especially true if the local Montessori ES and MS are not diverse (i.e. private, magnet schools). applicant should be asked to provide more information on the assessment strategy to be used t make sure students are successful and the program is meeting the needs of all students. - kellestracy</p> <p><u>Instructional Program</u> Applicant needs to provide evidence-based research on the efficacy of the Montessori model for high school students and specifically research with similar demographics to the proposed student population in Durham County.</p> <p>It is not clear what the details of the instructional program are. Terminology used is not expanded upon to provide a clear picture of what a day in this school would be like for students. More information is needed on integrative projects. - cande_honeycuttk</p>

<p><u>Curriculum and Instructional Design</u> "Students who are new to Montessori education typically do not struggle with the transition to this type of school" What evidence is the applicant basing this statement on? Would that be true at both elementary and secondary levels? How will multi-age grouping affect course placement and course credits? - kpiacenza</p> <p><u>Curriculum and Instructional Design</u> Explain more what the half day of specific teacher instruction will look like. Curriculum outline appeared to be cut off leaving the document unclear. - buffy_fowler</p> <p><u>Curriculum and Instructional Design</u> Applicant spends a lot of time discussion how this model will benefit students who are familiar with Montessori curriculum and structure but does not discuss how it will work for 9th grade student who are completely unfamiliar with the Montessori way. - kelleytracy</p> <p><u>Curriculum and Instructional Design</u> How will the school ensure students who are unfamiliar with Montessori methodology would be successful in this school? How will the school ensure a smooth transition? Applicant needs to provide further details on how multi-age course assignments would ensure appropriate course selection for credit. - cande_honeycuttk</p> <p><u>Curriculum and Instructional Design</u> Will daily schedule/format meet the minimum required contact hours per course? Projected course offerings for year 1 are confusing-English 1 & 2; Math 1, 2, and 3; Earth Science and Biology, Spanish 1 & 2 for 9th grade? Honors courses only receive 0.5 extra weight. - sherryreeves</p> <p><u>Special Programs and "At-Risk" Students</u> The narrative speaks primarily to accommodations and not necessarily the intervention process to be utilized. What is the specific plan? - kevin_allen</p> <p><u>Special Programs and "At-Risk" Students</u> Applicant needs to be asked how it will ensure that all student get the supports they need when the application states that students will get what they need if and when a teachers notices there is a need? Will there be a formal process with support systems for communication, referral, modifications, tracking , accommodations etc. How will teachers and staff be trained to create their own RTI system. - kelleytracy</p> <p><u>Special Programs and "At-Risk" Students</u> Applicant refers to RTI although most schools have transitioned to MTSS. Applicant fails to provide process for intervention for students. How will students be identified? How will interventions be implemented? Additional details are needed to ensure the applicant has a strong plan for serving at-risk students. - cande_honeycuttk</p> <p><u>Special Programs and "At-Risk" Students</u> Explanation of RTI process does not support an understanding of RTI. - sherryreeves</p> <p><u>Exceptional Children – Identification and Records</u> What is your child find process other than the admissions packet and how will you handle parent referrals? It should be noted that the RtI process is not the road to EC but rather a process to provide supports to all students. - kevin_allen</p>

<p><u>Exceptional Children – Identification and Records</u> Applicant needs to provide additional information on how they will implement Child Find outside of the admissions/enrollment time period. Plan lacks details sufficient to have clear evidence that they will be able to follow federal law. - cande_honeycuttk</p> <p><u>Exceptional Children – Education Programming</u> Plan is vague. - kevin_allen</p> <p><u>Exceptional Children – Education Programming</u> Applicant needs to expand upon this section to demonstrate they will be able to provide the full continuum of services. - cande_honeycuttk</p> <p><u>Exceptional Children – Education Programming</u> Is RTI the process for identifying "new" exceptional children? - sherryreeves</p> <p><u>Student Performance Standards</u> "Eldred Montessori's academic performance will be comparable to the surrounding charter and public schools in the area. Having looked at these school's scores we have selected the following goals for our school"- can the applicant provide the specific scores it is using to predict "comparable" performance goals for the school? How many schools? How many years of performance by these schools? Has growth been considered when establishing the performance goals? - kpiacenza</p> <p><u>Student Performance Standards</u> What is your specific plan for promotion and retention of students with disabilities? How does the school propose to meet the unique individual needs of students? Is there a team that will review all data. - kevin_allen</p> <p><u>Student Performance Standards</u> Explain how the percentages were determined and put the information into SMART goals. Explain how students receive credits for the classes. More information is needed about assessment tools and reflecting on student learning. - buffy_fowler</p> <p><u>Student Performance Standards</u> The student performance goals evidence low expectation for student learning as they are not substantively rigorous when compared to the LEA. Promotion criteria are not clear and the applicant does not provide evidence that the evaluation and assessment tools will result in data that will drive instruction, improve the curriculum to meet the needs of all students. Again, the applicant needs to specifically identify what formative assessments will be used and how that data will serve as the basis for evaluating the overall instructional program, and refine the curriculum as need according to student progress. The ability to be flexible is not evidence and to modify the Montessori curriculum if data reveals that students are not learning. - kelleytracy</p> <p><u>Student Performance Standards</u> Applicant needs to expand upon the data used. What were the actual percentages of the public and charter schools in Durham County that you used to create performance goals? Why are these percentages different from those listed in previous section based on state average or 60%?</p>

	<p>Does the school have any goals related to growth?</p> <p>What is the specific promotion/retention requirements for students with disabilities? How will the student's IEP be used to determine promotion or retention?</p> <p>Applicant needs to provide additional details on what is required for credit issuance. - cande_honeycuttk</p> <p><u>Student Performance Standards</u> Will the school also offer a Future Ready Occupational Course of Study? - sherryreeves</p> <p><u>Student Conduct and Discipline</u> Is there evidence supporting this discipline approach at the high school level? Does the teacher handle all behavior issues up to Tier 3? - kpiacenza</p> <p><u>Student Conduct and Discipline</u> How will you handle children with disabilities. This plan is vague and does not address providing services upon removal or following Policies Governing Services for Children with Disabilities. - kevin_allen</p> <p><u>Student Conduct and Discipline</u> The discipline and culture plans are not aligned to the Montessori way and are not likely to create a sustain a safe and orderly learning environment. Applicant missed opportunity to share the core tenets of Montessori guiding principles and core beliefs especially with regard to social justice precepts that can often reengage disengaged adolescents. It appears that the applicant group has little experience working with HS student populations and assumes that students will already be familiar with the Montessori way of thinking and learning and interacting. - kellelytracy</p> <p><u>Student Conduct and Discipline</u> Applicant needs to provide additional details on how this approach to discipline would serve high school students in providing a safe educational environment. At what point will an administrator be involved in this process? What are the specific disciplinary processes for students with disabilities? Like previous sections, applicant needs to provide more details. - cande_honeycuttk</p>
<p>Governance and Capacity</p>	<p><u>Tax-Exempt Status 501 (c)(3)</u> Not required at this time - cande_honeycuttk</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> Who will provide board the training referenced in this section? As the board adds members what other skill sets (beyond educators) will be recruited? - kpiacenza</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> The governing structure presented in the org chart is not clear with regard to other leadership positions and operations in the school. How will the governing board evaluate themselves? What specific PD will board have. Board does not have any members with high school, Montessori leadership, or charter school experience. Please clarify the decision to evaluate the principal using NC standards rather than Montessori leadership competencies so that Board know the s Montessori pedagogy is being implemented. - kellelytracy</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u></p>

<p>Small board lacks business, administrative, charter school, high school, and financial experience. What will be the strategic process to recruit board members with those skills and background?</p> <p>Applicant needs to provide specific examples of board training. - cande_honeycuttk</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> Explain the "Distributions in Kind" listed in by-laws. What is the relationship between Geraud Staton, Laine Hindley Staton and Helen Hindley? - sherryreeves</p> <p><u>Proposed Management Organization (EMO/CMO)</u> School does not have an EMO - cande_honeycuttk</p> <p><u>Staffing Plans, Hiring, and Management</u> The JD for teachers does not prioritize teachers with a Montessori background. - kellestracy</p> <p><u>Staffing Plans, Hiring, and Management</u> The board of directors should make final decisions regarding grievances.</p> <p>Bus Driver is not mentioned in the transportation plan. The school will not have a bus, why is there a bus driver listed? - cande_honeycuttk</p> <p><u>Staffing Plans, Hiring, and Management</u> Counselor year 1 Proposed salary range for various positions is "large." - sherryreeves</p> <p><u>Staff Evaluation and Professional Development</u> The PD plan does not prioritize the specific needs of HS adolescents, especially strategies for acculturation of students who will come without having been exposed to Montessori program tomorrow. - kellestracy</p> <p><u>Staff Evaluation and Professional Development</u> Will school be able to attract and retain qualified teachers with the requirement for earning a Montessori certification? - sherryreeves</p> <p><u>Marketing Plan</u> Applicant needs to be sked to provide a list of the feeder schools to be targeted to ensure that a wide range of educationally diverse students are being targeted and marketed to. - kellestracy</p> <p><u>Marketing Plan</u> Marketing plan is thorough but lacks specific information about the targeted feeder schools. Which schools will be considered feeders for this purpose and what is the overall demographics? How will the school ensure that this school is marketed to a diverse population of families? Durham is a highly diverse county. - cande_honeycuttk</p> <p><u>Parent and Community Involvement</u> There is a significant under appreciation in the articulation of how school will engage parents in the learning environment. Applicant needs to explore no traditional ways to engage families and parents, considering working parents, non English speakers, homes without internet connection. - kellestracy</p> <p><u>Admissions Policy</u></p>
--

	<p>If a family is not able or not willing to attend the "required" orientation, will they still be allowed to enroll? - kpiacenza</p> <p><u>Admissions Policy</u> What will happen if a family cannot make the orientation? Enrollment cannot be contingent upon attending an orientation as that may pose a barrier to enrollment for families. - cande_honeycutk</p> <p><u>Admissions Policy</u> Is there a limit to the number of children of board members or employees of the school that will be admitted? (Application states that these class of students will be admitted automatically.) If children of board members and employees are automatically admitted, how can "the first 100 numbers that are selected and then recorded for public record...be allowed to enroll"? This also does not account for the 14 potential students who will be admitted based on a weighted lottery. - sherryreeves</p> <p><u>Projected Student Enrollment (Table)</u> 100 students is not financially viable for a high school. It is dangerously close to the 80 student minimum. In addition, there was not sufficient evidence provided that there is a demand for this type of school. - cande_honeycutk</p> <p><u>Projected Student Enrollment (Table)</u> Will school be able to attract 100 9th grade students into a Montessori program? What is the 8th grade population of the targeted Montessori middle school? - sherryreeves</p> <p><u>Weighted Lottery</u> Applicant should be asked to provide a justification for recruiting poor residents in order to reach more black and Hispanic residents. The applicant should be asked to explain why they do not do a targeted recruitment plan at majority black and Hispanic MS which means they will not need to have parents submit income data which may be potentially in violation of the law. Applicant should reflect on whether they desire a racially diverse or economically diverse student population and design a targeted recruitment plan to achieve that end rather than relying exclusively on a weighted lottery. - kelleytracy</p> <p><u>Weighted Lottery</u> School will utilize a weighted lottery (14%) based on poverty-level. - sherryreeves</p> <p><u>Weighted Lottery</u> How will the applicant ensure that the weighted lottery for low-income students is not a proxy for a race-based weighted lottery. - dswalker</p>
<p>Operations</p>	<p><u>Transportation Plan</u> What criteria will be used to "qualify" students for bus passes? What accommodations will be made for students who don't live near a public bus route? - kpiacenza</p> <p><u>Transportation Plan</u> How will transportation be provided for students with disabilities if it is outlined in an IEP as a related service? - kevin_allen</p> <p><u>Transportation Plan</u> In staffing section, there is a salary for a bus driver. But there isn't a plan to have a bus.</p>

	<p>What criteria will be used to determine if students would qualify for bus passes? How will transportation for students with an IEP that requires transportation be handled?</p> <p>What happens if the school cannot find a suitable location within the targeted area? - cande_honeycuttk</p> <p><u>Transportation Plan</u> Transportation plan lacks details. Why was a bus driver included in the projected staffing with a \$30,000 salary if the plan is to utilize bus passes? How does a student qualify for a bus pass?</p> <p>- sherryreeves</p> <p><u>Transportation Plan</u> A bus pass is the plan but I saw a salary for a Bus Driver. Please explain. - theltoncsab</p> <p><u>School Lunch Plan</u> If a student receives a grocery gift card and still does not come to school with lunch, how will the school respond?</p> <p>"We will investigate contracting our lunches through the local LEA"- Can the applicant clarify this arrangement? How ould the logistics be handled? - kpiacenza</p> <p><u>School Lunch Plan</u> Gift cards will no ensure student have lunch--plan lacks intentionallity. - kelleytracy</p> <p><u>School Lunch Plan</u> How will the school ensure that no student is without a lunch? What will happen if a student receives a grocery card and still doesn't bring in lunch? What will be the process for any child coming to school without a lunch?</p> <p>Has the school had any preliminary discussions with the LEA to determine if Option 1 is viable? What about the logistics of transporting and serving meals? - cande_honeycuttk</p> <p><u>School Lunch Plan</u> What amount will be allotted on the monthly gift card for lunches? How will school determine who is eligible for gift card program? - sherryreeves</p> <p><u>School Lunch Plan</u> Innovative idea, but how does this ensure that no child lacks a daily meal? - dswalker</p> <p><u>Facility and Facility Contingency Plan</u> Note that the facility will be ADA compliant to meet the needs of those with disabilities. - kevin_allen</p> <p><u>Facility and Facility Contingency Plan</u> Is it reasonable to forego technology the first two years of high school? - buffy_fowler</p> <p><u>Facility and Facility Contingency Plan</u> How could a high school be competitive without technology in the first two years of operation? - cande_honeycuttk</p>
<p>Financial Plan</p>	<p><u>Budget Revenue Projections from Each LEA (Table)</u> Why is there a prediction of only 5% of the population being special ed? - buffy_fowler</p>

<p><u>Budget Revenue Projections from Each LEA (Table)</u> Concerns that 100 students for a first year is not sufficient for a viable high school. - cande_honeycuttk</p> <p><u>Budget Revenue Projections from Each LEA (Table)</u> EC estimate may be a little low. State average is closer to 13% if I remember correctly. - dswalker</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> Can the applicant clarify the cost per difference between instructional and admin staff for health insurance and retirement? - kpiacenza</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> Bus driver appears in proposed staffing but not in transportation plan and this budget.</p> <p>Applicant needs to clarify discrepancy between the benefits coverage for administration and instructional staff especially since both are being offered state retirement. - cande_honeycuttk</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> Staffing projection in Governance section lists a cafeteria employee, bus driver, guidance counselor and librarian but budget does not include any of these positions in year 1. Most of these positions are not listed in years 1-5. - sherryreeves</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> Can the applicant clarify \$0 for admin computers and software, student accounting (ISIS), utilities, classroom technology, and other instructional supplies?</p> <p>Where is furniture in budget?</p> <p>Will the school be contacting for any special education services; speech, audiology, psychological testing, etc.? - kpiacenza</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> Have funds been budgeted for related services as outline in a child's IEP? (OT, PT, Speech, Psychological Services etc) - kevin_allen</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> Copier lease appears to be low. Facility costs is more than described in facilities section. Explain extremely low utilities cost. - buffy_fowler</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> There is no budget for computers for office staff or instructional purposes. How will the school meet the requirements of utilizing PowerSchool/HomeBase, test coordination, general budgeting and accounting, etc. if there is no computers or software budgeted? Personal equipment should not have sensitive student information on it.</p> <p>Where are the funds budgeted for EC-related services such as speech, OT, PT, etc.? - cande_honeycuttk</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u></p>

	<p>No computer for office in year 1. Copier lease is almost nonexistent as well as communications/telephone. \$0 for insurance years 1-5. Explain utilities costs. Why is marketing \$1000 in year 1 but \$10,000 in year 5? No classroom technology in years 1-5. \$0 budgeted for curriculum/texts, copy paper, and testing supplies. Are these costs incorporated into instructional materials? - sherryreeves</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> Financial is way too low to receive an audit. Facility cost seems low. Electric, etc. for \$33 a year? Marketing budget is basically nonexistent. - dswalker</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> Many budget concerns. Costs are very low for all things facilities. Marketing is low for a specialized school. - theltoncsab</p> <p><u>Total Expenditure Projections (Table)</u> Can the applicant clarify the Operations Budget so that total expenditures are realistic? - kpiacenza</p> <p><u>Total Expenditure Projections (Table)</u> First year surplus is not sufficient to cover the deficiencies in the operations budget or if the school is unable to meet projected enrollment. - cande_honeycuttk</p> <p><u>Total Expenditure Projections (Table)</u> Although a surplus is shown for all 5 years, there are many "holes" in the budget that may actually deduct from these surpluses. - sherryreeves</p> <p><u>Budget Narrative</u> "Every year students from Lakewood Montessori Middle School are challenged with finding a high school that meets their needs"-Is the applicant expecting the school will mostly serve students from Lakewood Middle School?</p> <p>Will the "bookkeeper" handle student accounting, payroll, benefits management, and accounting, budget management? Will any of these tasks be contracted out?</p> <p>Can the school adequately serve EC students without contracting for needed services? - kpiacenza</p> <p><u>Budget Narrative</u> What will be the cost of hiring a CPA?</p> <p>Again, there is no mention of EC-related services. How will the school ensure IEPs are met? - cande_honeycuttk</p> <p><u>Financial Audits</u> There is no articulation of the internal controls that will be used. Applicant should be asked about the specific safeguards that will be put in place. - kelleytracy</p> <p><u>Financial Audits</u> The process for internal controls for financing are vague. Applicant needs to provide a more detailed plan to ensure the financial health of the school especially in light of the concerns expressed in the budgeting sections. - cande_honeycuttk</p>
--	--

OVERALL	<p><u>Grade Levels Served and Total Student Enrollment:</u> Starting a school, especially a high school with 100 students is particularly challenging. In addition, if there are not enough students, the school risks financial viability, program integrity and the maximum statutory enrollment is 80. Only 35 of 89 families surveyed indicated interest. - cande_honeycuttk</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> The numbers for a high school are very, very low. - theltoncsab</p>
----------------	--

Charter School Advisory Board Subcommittee	
Mission, Purposes, and Goals	
Education Plan	
Governance and Capacity	
Operations	
Financial Plan	
OVERALL	

Overall Summary	
Initial Screening 09/30/2016	<p>The Office of Charter Schools deemed this application complete on September 30, 2016. No further information is needed to begin the evaluation of this application.</p>
Application Review	<p>OCS provided a brief overview of the proposed application including the enrollment over five (5) years, proposed county, and mission of the proposed school. Four (4) board members were present for the clarification/review opportunity.</p> <p>Mr. Helton outlined his concerns with the enrollment and its impact on financials given the expenses at the high school level. Mr. Walker outlined the applicant demonstrated Montessori model well in the written application. Ms. Reeves questioned how the occupational course of study would work with the proposed Montessori Plan.</p> <p>Mr. Walker questioned the weighted lottery because as currently proposed it was more of a proxy on race instead of being based on the allowable socioeconomic guidelines. He outlined the parameters/legalities of conducting a weighted lottery and the correct way to conduct one. Mr. Walker wanted to know how the school would ensure the parents were not benefiting from the lunch gift cards proposed for the lunch program and wanted to</p>

	<p>know more about what the boards plan was to handle parents who may abuse the lunch gift cards.</p> <p>Mr. Helton drilled the transportation plan and the budgeting of the bus drivers. Ms. Reeves questioned the relationship between two (2) board members and the proposed bylaws. The requirement of Montessori was a big ask and how would the proposed applicant attract and retain teachers. Ms. Reeves sought clarification on the boards understanding of lottery preference regarding board members and if the proposed board understood that only a certain percentage is allowed.</p> <p>Mr. Walker discussed his concerns with the budget section, which he failed, while passing all other sections. He specifically pointed to particular budget line items and outlined the specific concerns. There were many issues with the budget outlined in the application. Ms. Reeves echoed Mr. Walkers sentiments and pointed to the numerous deficits in the budget. Mr. Walker outlined that the budget needed to be redone.</p> <p>The proposed applicant group outlined the idea came for the proposed lunch plan outlined in the application came from an established charter school, Francine Delaney. She communicated she discussed with Ms. Fowler, Head of School, Francine Delaney, no the specifics of the proposed lunch program. Also, the school planned to use a farm to school method for lunch once it was up and running as it currently projected 20% poverty.</p> <p>Mr. Helton outlined his concern with the projected enrollment and drilled if the school would meet the specific enrollment given the 80 student requirement outlined in statute. The proposed board member outlined her past experience and that the board had given consideration to this scenario. Mr. Walker hoped group would apply next year and correct the budget outlined in the application. One proposed board member outlined most of the issues were a line placement error.</p> <p>Ms. Reeves made a committee motion to not grant an interview for Eldred MontessoriSecondary School. Mr. Helton seconded because of the many financial concerns. The motion passed 4 to 1 with Ms. Gibbs dissenting.</p> <p>Mr. Walker made a motion to the full CSAB not to allow an interview for Eldred Montessori Secondary School. Mr. Quigley seconded. Mr. Hawkes responded that the problems with the organizational chart needed to be corrected as well if the school applies next year. He hoped the group brings back the plan as he loved idea. The motion passed 9 to 1 with Ms. Gibbs dissenting.</p>
<p>Application Interview</p>	
<p>OVERALL</p>	