



Organization Information

Organization Name *

Encompass Montessori Charter School

Application Type *

Acceleration

Operator Type *

EMO/CMO

Primary Contact Name *

Katie Brown

Has the School Leader Been Identified? *

☐ Yes ☒ No

Is Management Organization Used

☐ Yes ☒ No

Management Organization Name

Primary Contact Relation To Board *

Board President

Primary Contact Email *

encompass@public-montessori.org

Proposed Leader Name *

TBD

Management Organization Contact Name

Primary Contact Phone *

9494006175

Management Organization Email

Primary Contact Address *

4030 Wake Forest Road

Unit/Suite *

Zip Code *

27609

City *

Raleigh

State *

North Carolina

Proposed Leader Job *

Executive Director



1. Application Contact and Student Enrollment Information

Q1.Name of Proposed Charter School

Encompass Montessori Charter School

Q2.Primary Contact's Alternate Telephone Number (xxx-xxx-xxxx)

- The primary contact will serve as the contact for follow-up, interviews, and notices regarding this Application

(949)400-6175

Q3.Geographic County in which charter school will reside

Wake

Q4.LEA/District Name

Wake County Public Schools

Q5.Zip code for the proposed school site, if known. Please provide a primary zip code location and a secondary, or alternative, proposed zip code.

Primary: 27545

Alternative: 27610

Q6.Was this application prepared with the assistance of a third party such as a consultant or Charter Support Organization (CSO)?

I. Definition - Charter Support Organization (CSO) - A for profit or nonprofit, nongovernmental entity that provides:

a. assistance to developers during the application, planning, program design, and initial implementation of a charter school; or



b. technical assistance to operating charter schools, including specific and limited services such as but not limited to professional development, nonprofit board development, payroll, and curriculum development.

☒ Yes

☐ No

Q7. Provide the name of the third-party consultant or CSO.

National Center for Montessori in the Public Sector (<http://public-montessori.org>)
(NCMPS)

Epic Change Education (ECE)

Q8. Describe any fees provided to the third-party person or CSO in preparation of this application and, if applicable, any future fees as reflected in the budget.

N/a

Q9. What assistance was provided by the third-party consultant or group while preparing this application, what assistance is currently being provided, and when the assistance will end?



The National Center for Montessori in the Public Sector (NCMPS) provided guidance during the development of this charter application in collaboration with the founding team and Board of Directors. Their support focused primarily on informing the Educational Plan through established public Montessori practices. All support for the charter application from NCMPS has been provided on a pro bono basis and will conclude upon submission of the application. References to throughout this application to NCMPS's work and tools reflect the use of publicly available resources and professional networks.

Epic Change Education (ECE) also provided guidance during the development of the application in collaboration with the founding team and Board of Directors, on a pro bono basis. This support included general input on alignment across sections of the application. All support for the charter application from ECE has been provided on a pro bono basis and will conclude upon submission of the application.

The design of Encompass Montessori is the sole responsibility of the Board of Directors, and while it reflects Montessori best practices used in public settings, all programmatic decisions are independently determined by the Board.

Q10. Projected School Opening Month

August 2028

Q11. Will this school operate on a year-round schedule?

- ☐ Yes (Year-Round)
- ☒ No



Q12. Complete the Enrollment Summary table (see resources), providing grade levels and total projected student enrollment for Years 1-5.

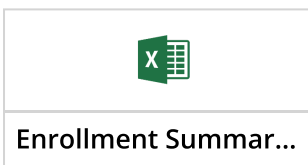
- Please note: If applying as a "**FACE VIRTUAL**" remote academy, the applicant must provide separate enrollment figures for in-person and remote student cohorts (see resources).
- State law requires that a charter school serve a minimum of 80 students unless the school has a compelling reason such as serving a geographically remote student population. 115C-218.1(13).

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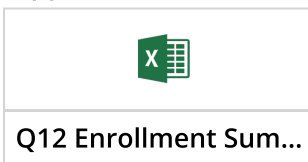
Applicant Comments :

Attached

Resources



Applicant Evidence :



Uploaded on **5/22/2026**
by **Katie Brown**

Q13. At full capacity, what is your estimated student enrollment and grade spans?

At full capacity, we estimate student enrollment to be 864 students. Encompass will serve students in grades K through 8. This will be in 2037-2038.



Q14. How did you determine the projected enrollment targets and grade levels listed in this application? Reference data, methodology, calculations and other factors used.



The Montessori model features a child-led, hands-on, multi-age classroom approach, which will be new to many of our students and families.

Montessori schools have been successfully serving students for 100 years, most often in the private sector. The “brand” is strong, and families are excited about the opportunity to access this education as a free, public option. Montessori is a growing and popular choice for families. There is not another public Montessori option within a reasonable distance of our location and those that are further away have waitlists. We are confident that with our strong marketing and outreach efforts, we will be able to attract families who want this option for their children and meet our capacity and growth expectations. As members of this community, we know how important it is for our families to feel a part of their children’s school and to be able to trust that school is going to be a warm and welcoming place for them. In our outreach efforts, parents confirm that this is a wanted, and needed, option in the community. In the space of just two months, families have submitted interest forms for 26 prospective students.

The accepted best practice in opening a new Montessori school is to start with the entry year(s) and grow organically year-by-year as students graduate from one grade and matriculate into the next (www.public-montessori.org). A “slow-growth” model in a strong school with good retention, allows for the great majority of students to have “come up through the ranks” and be well prepared in this unique personalized model for the increasing levels of academic challenge, independence, and responsibility of each ensuing year. This is the reason we are starting with kindergarten and first grade in our first year and then adding a grade each year until we reach full enrollment with a complete K - 8 program.

We will begin in Year One with 72 Kindergarteners and 72 First Graders, learning together in six classrooms, with Teaching Assistants to support the classrooms. In the first year, it is important to normalize the hands-on, student-led work, the longer work cycles, and the cooperative cultural elements to set a strong foundation.

In Year Two, we will launch our Lower Elementary (Lower-El) classrooms, with 1st and 2nd graders. We will also expand our Kindergarten recruitment to 96 students. We anticipate enrolling students from a wide variety of homeschool and preschool options, so our first year of Kindergarten will be dedicated to normalizing the students around a cohesive Montessori culture and structure.



From Year Two onwards, we use an organic growth model, which will ensure the students and teachers create strong bonds with each other and students experience the full cycle of the Montessori curriculum. With the natural attrition of students moving in and out of the area and siblings needing spots in upper grades, we expect a handful of students entering in other grades. It will be a seamless transition for them because they will be supported by a majority of students who are familiar with the model.

Upper Elementary (Upper-El) is a three-year cycle for 4th, 5th, and 6th graders, and Middle School will focus on preparing our 7th and 8th graders for their entry into High School. Each grouping is developmentally appropriate, and the multi-age grouping enhances each student's individualized experience, naturally providing opportunities for extra support and additional challenges within the context of their daily work cycles.

At full enrollment, we will have:

- 4 Kindergarten classrooms, with 24 students per class,
- 12 Lower-El classrooms, each with 24 Students: 8 First, 8 Second, and 8 Third Graders.
- 12 Upper-El classrooms will also have 24 Students per class: 8 Fourth, 8 Fifth, and 8 Sixth Graders.
- 8 Middle School classrooms will have 24 Students per classroom: 12 Seventh and 12 Eighth Graders.

The organic growth model supports successful public montessori execution, as evidenced by schools like Innovation Montessori Ocoee, in Florida, which is a successful PreK-12 charter school that uses this model of growth. The data shows that the multi-age model supports students best, not only academically, but also in social-emotional metrics. Having the same teacher for multiple years also deepens the relationship between teacher and student and develops a strong understanding of a student's academic gifts and deficits.

Q15. Provide a narrative explaining the projected demographics of your targeted county/LEA/region over the next 10-25 years. Reference data, methodology, calculations



and other factors used.

- This information should provide evidence of school age populations corresponding to the grade levels you plan to serve, and whether those populations are increasing or decreasing. This information should support the applicant’s stated demand for this charter school and the growth plan outlined in the enrollment chart provided in Q12.

The enrollment targets for our proposed charter school are strongly supported by rapid population growth in Eastern Wake County. This area is expanding quickly, growing from 1.13 million residents in 2020 to over 1.23 million in 2024, with the Office of State Budget Management projecting up to 1.9 million by 2050. Within this growth, the 0–17 age cohort is expected to increase by 3.6% between 2024 and 2029. Eastern Wake communities, including Wendell, Zebulon, and Knightdale, are at the epicenter of this expansion. Driven by new residential developments and an influx of young families, the local school-age population is surging. Combining these demographic realities—backed by U.S. Census and OSBM data—with a growing community demand for school choice, there is a clear and sustained need for additional educational capacity in Eastern Wake County over the next 10 to 25 years.

Q16. Complete the Enrollment Demographics table (see resources), providing projected enrollment for each of the following demographic groups.

Attached

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Resources



Enrollment Demogr...



Applicant Evidence :


Enrollment Demogr...

Uploaded on **5/16/2026**
by **Katie Brown**

Q17.Does the school plan to provide services to certain targeted subgroup(s)? If so, please explain.

No

Q18.This subsection is entirely original and has not been copied, pasted, or otherwise reproduced from any other application.

- ☒ Yes
- ☐ No

Q19.Explanation (optional)



2. Non-Profit Corporation Information

Private Non-profit Corporation (NCGS 115C-218.1)

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

Q20. Organization Type: Nonprofit Corporation or Municipality

- Private Nonprofit Corporation (NCGS 115C-218.1) The nonprofit corporation must be officially authorized by the NC Secretary of State upon application submission.

- ☒ Non-Profit Corporation
- ☐ Municipality

Q21. Official name of the private, non-profit corporation as registered with the NC Secretary of State.

- This is the entity that will hold the Charter if final approval is granted by the NC Charter Schools Review Board (CSRB).

Encompass Montessori

Q22. Does the private non-profit listed as the responsible organization for the proposed charter school have 501(c)(3) status?

- ☒ Yes
- ☐ No

Q24. Attach as Appendix F Federal Documentation of Tax-Exempt Status.

Attached



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Total Files Count: 10

Applicant Evidence :


Q24 Nonprofit Desig...

Uploaded on **4/23/2026**

by **Katie Brown**

Q25.Name of Registered Agent and Address as listed with the NC Secretary of State

Northwest Registered Agent

4030 Wake Forest Road, Suite 349

Raleigh, NC 27609

Q26.If applying as a municipality, please provide the name of municipality.

N/a

Q27.Attach Appendix K Articles of Incorporation or Municipal Charter

- If the applicant is a non-profit board of directors, attach a copy of the articles of incorporation from the NC Department of the Secretary of State.
- If the applicant is a municipality, attach a copy of the municipal charter.

☒ Upload Required File Type: pdf, image, excel, word Max File Size: 30 Total Files Count: 10

Applicant Evidence :


Q27- NC - Formation...

Uploaded on **4/23/2026**

by **Katie Brown**



Q28. Attach as Appendix J Proposed By-Laws of the Nonprofit Organization or Municipality 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.

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Applicant Evidence :


Encompass Montess...

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by **Katie Brown**



3. Governance and Capacity

3.1. School Governing Body

Q29. Organization Street Address (if you have one)

- On the Organization Information page, you already provided the mailing address.

N/a

3.2. Governance

The private nonprofit corporation or municipality 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.

Q30. The private nonprofit corporation or municipality 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. Using the attached resource as a template, please complete the table depicting the initial members of the nonprofit organization.

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Resources


Initial Members of t...



Applicant Evidence :



Q30 Initial Members...

Uploaded on **4/22/2026**
by **Katie Brown**

Q31. Describe 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.



Encompass Montessori shall operate as a North Carolina nonprofit organization, with a Board of Directors (BOD), who are responsible for ensuring the school's success. The Board of Directors is responsible for upholding the mission of the school and ensuring that the school is faithful to its charter, adheres to all authorizer and/or state requirements, and remains financially sound.

The articles of incorporation, the 501(c)(3) tax exempt filing form, the governing bylaws, and the governing board code of ethics and conflict of interest policy are included in this application. The Board of Directors sets policies and annual budgets, with input from the School Administrator, as well as serves as the oversight body for the School Administrator's role as the head of Operations.

The School Administrator reports to the Board of Directors, with the Board President serving as the primary point of contact and will attend all board and finance committee meetings to facilitate communications and ensure the school is progressing toward strategic goals in keeping with the mission and vision of the school.

The School Administrator's primary role is school operational management, and the Board of Directors' primary roles are governance and oversight. The mission of the school and the guiding principles of grace and courtesy will guide the relationships between the BOD and the School Administrator to establish and reinforce the Montessori culture.

The School Administrator may be titled the CEO, Executive Director, or Principal, to be determined upon hiring of the administrative leader. Additional operational leadership and staff may be added if the School Administrator determines it would benefit the school's financial and educational success of the school, and if the Board of Directors approves the additional staff.

All staff report to the School Administrator and their leadership team.

The BOD Vice President will work with the BOD President on the various oversight, strategic, partnership, community relations, and facility needs.

The BOD Treasurer will be the head of the Finance committee.

The BOD Secretary will be responsible for keeping records in order and in compliance, and will serve as a resource for agendas and documentation.



The PTO will also work with the School Administrator to ensure that the initiatives of the organization align with the mission, vision, and purpose of the school, including areas of fundraising, culture, competitions, and events. If a PTO initiative relates to school policy, mission, or vision, it will be referred to school leadership for consideration, as the PTO/PTA does not have authority over governance or policy decisions.

Board Committees will be added on permanent, or temporary bases, depending on the needs of the Board of Directors to effectively oversee the governance of the school.

Q32. Describe the size, current and desired composition, powers, and duties of the governing board.



The governing board will range from 5-7 members. Our ideal composition would be to have expertise in Finance, Montessori education, Fundraising, Business, and Charter Schools, who are from the local community. Our founding board will contain members from both within and outside the community who are sharing their expertise to help ensure the foundations of an effective public Montessori education are strong.

All business of the Board of Directors will operate under applicable State of North Carolina law to execute the following duties and responsibilities:

1. The overall governance of the charter school, ensuring that it operates in compliance with applicable laws, regulations, and the charter agreement.
2. Oversight of the school's finances, including effective budgeting, accurate financial reporting, and to ensure funds are used in accordance with legal requirements to achieve the mission of the school.
3. Upholding the mission, vision and long-term strategic goals set by the Founding Board and approved by the charter authorizer.
4. Accountability to the authorizing body and must ensure that the school meets performance standards and educational outcomes as outlined in the charter.
5. Establishment of policies that govern the school's operations.
6. Hiring, supporting, and evaluating the school's principal or executive director, ensuring effective leadership.
7. Engaging with parents, students, and the community to ensure policies are in place to best meet the needs of its stakeholders, while honoring the school's mission and vision, and respecting the School Administrator's management of daily operations.
8. Ensuring that the school complies with all federal, state, and local laws, including reporting requirements and educational standards.
9. Engaging in strategic planning to ensure the long-term financial security of the school and the well-being of the students are paramount.

Q33. Describe the founding board's individual and collective qualifications for implementing the school design successfully.



The founding board of Encompass Montessori comprises seasoned educators and nonprofit leaders with deep charter school experience and meaningful ties to the target community. This group brings the educational expertise to craft a high-quality Montessori program, the financial acumen to effectively manage a school with limited resources, and the community credibility to recruit a full cohort of students and families.

Board President Dr. Katie Brown, Ph.D., is the Director of Research and Professional Learning at NCMPS. Dr. Brown holds a doctorate in curriculum and instruction and has dedicated nine combined years serving on the board of Breakthrough Montessori Public Charter School in Washington, DC and Sterling Montessori Academy and Charter School in Morrisville, NC. She has served in the roles of board treasurer, board secretary, and governance committee chair. Dr. Brown also brings classroom teaching experience from charter schools in both California and North Carolina.

Board Vice President Karyn T Farmer is a mission-driven nonprofit executive leading the SEED Community Foundation of Zebulon, NC. She is a strategic consultant with 25+ years of leadership in cybersecurity, IT program management, workforce development, STEM youth training, and community-based initiatives. Karyn leverages her BS in Mathematics/Comp Sci to develop innovative and hands-on learning for homeschool cohorts and Middle School students in Wake and Durham Counties. She has a proven record of building high-performing teams, securing and managing grant funding, and translating complex technical expertise into sustainable nonprofit impact. Karyn is recognized in Wake County for aligning strategy, compliance, and partnerships to drive funding growth, optimal performance and measurable community outcomes. For example, she established and currently leads youth garden clubs at Zebulon, NC Boys & Girls Club and the Governor Morehead School for the Blind and Visually Impaired in Raleigh, NC. Karyn has a passion for educating underserved communities. Karyn teaches Algebra and tutors students in Wake and Durham counties. She serves on the Board of Directors for the Zebulon Chamber of Commerce and is the Chair of the Zebulon Steel Magnolia Garden Club's Community Outreach committee.

Board Secretary Rachael Shaw Marshall, M.Ed., brings more than twenty years of experience in Montessori education, with a background spanning classroom teaching and school leadership. She has served in a variety of roles supporting students from preschool through adolescence and has extensive experience in staff development, hiring, and program design. Rachael previously worked as Curriculum Director for a



North Carolina public charter school, where she helped guide curriculum development and program implementation within a public education framework. Throughout her career, she has worked closely with school boards and leadership teams, contributing to strategic conversations about school growth, educational quality, and community engagement. Her experience bridges innovative educational models and public accountability, giving her a strong understanding of both mission-driven education and responsible governance. Currently residing in Western North Carolina, Rachael is committed to supporting high-quality public education and helping charter schools build strong, sustainable programs that serve students, families, and the broader community.

Board Treasurer Alexis Weddings is the owner of ASW Financial Services, LLC and an accountant with Narron CPA. She holds a Bachelor's degree in Business Administration with a minor in Accounting and a concentration in Finance. Mrs. Weddings brings over 22 years of experience in the finance industry, including the last 12 years specializing in charter school finance in North Carolina. Her professional experience includes financial management, budgeting, compliance, and strategic planning, all essential for launching and sustaining a high-quality Montessori charter school that fosters student-centered learning and individualized growth. Actively engaged in Eastern Wake County, she serves as a Chamber Champion for the Zebulon Chamber of Commerce and is a member of the Wendell and Triangle East Chambers of Commerce, as well as the East Wake Women's Business Alliance. Her financial expertise, strong community connections, and understanding of Montessori principles will support the board's ability to implement the school's mission and ensure long-term academic and financial success.

Kelly Bradford is a research and teaching assistant at UNCG in Education Leadership and Cultural Foundations as she completes her PhD. She has a Masters of School Administration from Appalachian State University and a Bachelors of Music Education from UNCG. She has been a teacher and school leader for a charter school in Wake Forest and collaborated providing professional development to local charter schools on topics like engaged learning and STEM. Before working at the charter school Kelly taught public school. She is active in her community volunteering as a coordinator with Lily Moms, a mentorship program for mothers. She has served on the NC Foster Care Advisory Board and was part of the NC Advancing Charter Collaboration and Excellence for Student Success Fellowship for Purposeful Leadership, NCDPI, 2022-2023.



Q34.Explain how this governance structure and composition will help ensure the school's success, the board's evaluation of that success, and active stakeholder representation.

The Founding Board comprises members with deep roots in the community, expertise in public Montessori, experience with charter school governance and operations, and financial acumen. When executed with fidelity, Montessori education has been shown to support the development of critical thinking, communication, collaboration, and self-regulation—skills that align with Pillar 1 of the 2025-2030 Strategic Plan for North Carolina Public Schools. Our students need these 21st-century skills to be able to thrive, and Montessori done right achieves this.

When setting initial policies, procedures, budgets, and strategic plans, the dollars should serve the education, and a strong board is integral to ensure the student educational needs are prioritized in the budget. The Board will undergo training to ensure members have the skills and knowledge needed to govern the school effectively, including charter school law and governance, financial oversight, academic accountability, data review, and best practices in nonprofit board governance. Board members will complete an annual self-evaluation to assess performance and progress toward goals.

Seasoned non-profit organizational leaders ensure the integrity is upheld and the foundation of the school is seeded with servant leaders and community members who are committed to the mission of the school. Board recruitment will continue to focus on the populations served by the school to facilitate active stakeholder representation, with an eye toward diversity of skills, perspectives, and voices.

Q35.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?



The founding board members came together based on a deep appreciation for the effectiveness of the Montessori method in the public sector and a desire to see that education benefit students who do not have access to this type of child-led, hands-on education. This team reached out to their community and professional networks to discover Wake County residents did not have ready access to this type of education, and the area was in need of schools to help serve its growing population. Founding board members Katie Brown, Karyn Farmer, Rachael Shaw Marshall, Kelly Bradford, and Alexis Weddings all call North Carolina home and have deep educational experience. We intentionally and strategically desired a board composed of complementary educational, community and entrepreneurial skills with an odd number. Founding board members were identified through professional networks and selected based on their expertise in education, governance, and community engagement, as well as their shared commitment to expanding access to high-quality public Montessori education. Each member was invited to join the board based on their ability to contribute to the successful planning and oversight of the school. We established a competency assessment, geographic target, and interview questions to vet all founding board members.

Board outreach and recruitment will be ongoing, as effective boards don't wait for a vacancy to identify suitable candidates to join the board. Prospective board members will be recruited from both the school community and the surrounding community. The Board will maintain a skills matrix to identify gaps in expertise and will prioritize candidates who bring needed experience in areas such as finance, law, education, and community representation. Potential candidates will be reviewed by the Governance Committee, interviewed, and recommended to the full Board for approval. Recruitment will focus on skillsets identified as needed for the Board in accordance with the Board's current objectives and work. Nomination and election of new board members will follow the procedures outlined in the Encompass Montessori bylaws, with the goal of identifying and onboarding new members within 60–90 days of a vacancy to ensure the work of the Board proceeds without delay. Final approval of all new board members will be made by a vote of the full Board of Directors in accordance with the bylaws.

Q36. Describe the group's ties to and/or knowledge of the target community.



The group has strong, comprehensive ties to the Wake County community and a clear commitment to expanding educational opportunities through a tuition-free public Montessori charter school. These ties are particularly strong in the eastern Wake County communities of Knightdale, Wake Forest, Youngsville, Wendell, Zebulon, and Garner, which are the primary areas the school intends to serve. Members of the group live and work in eastern Wake county and have established relationships with families, educators, community organizations, and local leaders. These relationships include connections with local childcare providers, community organizations, and families currently navigating school choice options in these areas. Through these connections, the group has gained a strong understanding of the educational needs of the community, including the growing demand for accessible, high-quality Montessori education. Through conversations with families, participation in community events, and ongoing outreach efforts, the group has gathered direct input about the need for more accessible, high-quality public school options, particularly those that offer individualized learning approaches. The group has actively engaged with families and community stakeholders to better understand their priorities and ensure that the school's mission aligns with the needs of the students it will serve. This feedback has directly informed the school's design, including its emphasis on a K-8 model, mixed-age classrooms, and a focus on accessibility for families who have not traditionally had access to Montessori education. These relationships and community insights position the group to effectively support and serve the target community.

Some members of the founding group bring particularly strong connections to Eastern Wake County, including long-standing personal and professional ties to the Knightdale, Wendell, Clayton, and surrounding communities. For example, Alexis Weddings has lived and/or worked in the Knightdale and Wendell area for more than twenty-four years and grew up nearby in Clayton. This longstanding presence has allowed her to develop trusted relationships within the community and a clear understanding of the region's growth, family demographics, and educational landscape. In her professional role as an accountant and financial consultant, she has worked extensively with charter schools and nonprofit organizations across the eastern part of North Carolina, supporting budgeting, compliance, financial planning, and sustainable operational practices. This experience provides valuable insight into the financial realities and opportunities associated with launching and maintaining a successful public charter school.

In addition to her professional experience, Mrs. Weddings maintains active civic and



business involvement throughout Eastern Wake County. She is a member of the Wendell Chamber of Commerce, serves as a Chamber Champion for the Zebulon Chamber of Commerce, and is also a member of the Triangle East Chamber of Commerce and the East Wake Women's Business Alliance. Through these roles, she collaborates with local business leaders, community partners, and regional stakeholders to support economic development initiatives and strengthen community connections.

Additionally, Kelly Bradford grew up in Rolesville and has taught, worked, served and lived in the Wake Forest/Rolesville area most of her adult life. As a school leader, she participated in the NC Advancing Charter Collaboration and Excellence for Student Success Fellowship for Purposeful Leadership, NCDPI, 2022-2023 and has worked collaboratively with other local charter schools to develop their STEM programs. In her time as a local educator she worked to bring in volunteers to her charter school, often having as many as 40 local community members visiting her school's classrooms to engage with students and support the school. She has been an active participant as a volunteer coach in youth sports, serves as a mentor and co-director in a local non-profit for young moms and actively participates in local community events. While her children were young she was active in the eastern Wake county home school community, leading activities and classes for their co-op. Her connection with that community will allow us to reach out to current homeschool families who have been waiting for a charter school with a Montessori approach. She brings a wealth of relationships with young families, community members and educators who will support her work bringing this proposed Montessori charter school to the community.

Karyn Farmer is a community leader providing STEAM and sustainability education to youth with an impact in Zebulon, Raleigh and Durham. She is deeply engaged in the communities she serves and has fostered strong relationships with city officials, families and Civic Organizations. Karyn is an active member of the Zebulon Chamber of Commerce, she serves as the Community Outreach Chair for the Zebulon garden club and her nonprofit organization, SEED Community Foundation, is located in the heart of Zebulon, NC. Deeply involved in the homeschool community in Eastern Wake County, she has a strong pulse of the community's educational needs and has built relationships with the Town and business owners that uniquely positions her to swiftly rally around an initiative with key stakeholders that have the power and influence to be change agents.



These combined personal, professional, and civic ties — along with the broader group's engagement across Wake County — position the founding team to thoughtfully respond to community needs, build strong partnerships, and successfully support the implementation and long-term sustainability of the proposed Montessori charter school.

Q37. Outline the strategic board calendar detailing how often the board will meet according to the bylaws established. Describe any advisory bodies, councils, or associations listed in the organization chart or to be formed, including their roles and duties, and the reporting structure.

According to established bylaws, meetings are required quarterly, but our Founding board will meet monthly up to the opening of the school and will work with the Executive Director to set a board schedule that supports the operations and allows for appropriate oversight. Following the opening of the school, the Board of Directors will continue to meet on a regular monthly basis, unless otherwise determined by the bylaws, to ensure consistent oversight of academic, financial, and operational performance.

The Board will establish standing committees, including a Finance Committee and Governance Committee, to support its work. These committees will meet as needed and provide regular reports and recommendations to the full Board of Directors.

Advisory bodies, councils, or associations may be formed as needed to support the board and school leadership, particularly in areas such as community engagement, fundraising, and school culture. Prior to opening, the ED and BOD will solicit parents to launch a PTO/PTA that will work in conjunction with the school to support the culture of the school. It will be independently governed. The PTO/PTA will support school culture, family engagement, and fundraising efforts, and will work collaboratively with school leadership while remaining separate from the Board's governance responsibilities.

The Executive Director will report directly to the Board of Directors and will provide regular updates on school performance, operations, and strategic goals. Advisory groups such as the PTO/PTA will coordinate with the Executive Director or designated school staff, and will not have governing authority.



Q38. 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.

New Board members will receive an orientation to Montessori principles to support informed governance and take a board governance course through the National Charter Schools Institute training for new board members. Both trainings will be required. Specific topics of the Montessori orientation training include: developmentally appropriate education, pedagogy, grace and courtesy, and self-regulation and autonomy in children. Board training will focus on the board's role as policy makers, oversight, and protectors of the mission, and to understand the difference between governance and operations. These trainings will be offered twice yearly for any and all incoming board members.

Ongoing professional development will be provided to all board members on an annual basis. Topics will include updates on charter school law and governance, financial oversight, academic accountability, data review, and best practices in nonprofit board governance. Additional training will be provided as needed based on the evolving needs of the school and Board.

Board members will be expected to participate in all required trainings, and completion will be documented and tracked by the Board Chair or Governance Committee.

Q39. 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.



Board members are required to submit a signed Code of Ethics policy, in addition to adhering to our Conflict of Interest policy, which requires any and all potential conflicts of interest to be disclosed, such as familial relationships and business dealings. Board members must identify conflicts in writing annually and must recuse themselves from participating in discussion or voting on any matter that is a conflict or could create the perception of a conflict. Board members who are in violation of the Code of Ethics and/or the Conflict of Interest policy will have an opportunity to explain their actions before the full board, and they may also be removed from board service with a majority vote of the Board of Directors.

The current Board President, Katie Brown, is an employee of the National Center for Montessori in the Public Sector, a nonprofit organization that provides professional development, technical assistance, and resources for public Montessori schools. In accordance with our board policy regarding conflict of interest, in the event that NCMPs is a candidate to provide paid services to Encompass Montessori, Dr. Brown will recuse herself from discussion and vote.

Q40. Explain the decision-making processes the board will use to develop school policies.



Board decisions will be made with due care and diligence. At Board meetings, there will be mandatory time allotted for public comment to listen to the stakeholders and how decisions may affect them. The Board's role to oversee, yet support, the Executive Director requires them to take into account the Executive Director's position as the operational chief and take care not to infringe upon their right to manage operations. However, they do need to be proactive in identifying any potential financial or educational risk factors and address them immediately with the Executive Director, raising concerns to the Executive Director for consideration and response.

Board Members will rely upon factual evidence, research, and data, and will honor their duty to uphold the charter and the mission of the school. Personal opinions and preferences shall hold no sway upon Board Member decisions. It is the duty of the Board Members to remain impartial and objective.

They will also balance the needs of the students and the long-term financial stability of the school. Those two guiding ballasts will help in creating and adapting policies to support a successful school.

Formal Board decisions will be made through a majority vote at duly noticed meetings in accordance with North Carolina Open Meetings Law and the Board's bylaws.

Q41. 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.



Advisory bodies, councils, or associations may be formed as needed to support the Board of Directors and school leadership, particularly in areas such as family engagement, community partnerships, and school culture. Prior to opening, the ED and BOD will solicit parents to launch a PTO/PTA that will work in conjunction with the school to support the culture of the school. It will be independently governed. The PTO/PTA will support family engagement, school culture, and fundraising efforts, and may assist in organizing school events, volunteer opportunities, and communication between families and the school. The PTO/PTA will work collaboratively with the Executive Director or designated school staff and will not have governing authority over school operations or Board decisions. All advisory bodies will operate in alignment with the school's mission and will provide input and recommendations to school leadership, with the Executive Director responsible for communicating relevant information to the Board of Directors.

Q42. How will the board ensure grievances/concerns from parents and staff members are heard?

The school will develop detailed handbooks for both parents/students and staff that will provide a pathway for parents and staff to follow, which will advise that grievances should always be taken to the immediate individual involved. After that, if the issue is not resolved, it can be taken to the next individual up on the organizational chart, until a peaceful, satisfying resolution can be found. Timelines and procedures for each step of the grievance process will be clearly outlined in the Parent/Student Handbook as well as the Staff Handbook.

If resolution is not found with the Executive Director, the Board is at the top of the organizational chart and the Grievance Committee will hear the matter.

Parents and staff who have not attempted resolution through following this chain of responsibility and action may not bring the matter directly to the Board of Directors unless there are circumstances that prevent them from following the normal procedures for grievance resolution.

As a Montessori school, steeped in grace and courtesy, peaceful mediation will be the goal in addressing grievances.

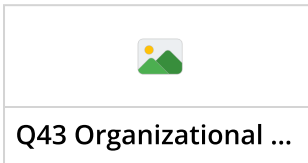


Q43. [Attach as Appendix Organizational Chart.](#)

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Total Files Count: 5

Applicant Evidence :



Uploaded on **4/22/2026**
by **Katie Brown**

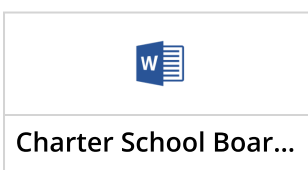
Q44. [Attach as Appendix Charter School Board Member Information Form and Resume.](#)

- How were you recruited and Why do you wish to serve - are asked twice, in succession. Just a redundancy we need to remove.
- The very first question - Have you ever served before? is a Yes or No. About 6-7 questions down, they are asked to describe their past board service. I would move that up to the Yes/No question to tie the two together.

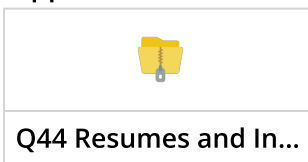
Attached

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Resources



Applicant Evidence :



Uploaded on **4/24/2026**
by **Katie Brown**



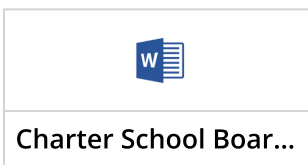
Q45. Attach Appendix For Each Board Member: Charter School Board Member Background Certification Statement and Completed Background Check. PLEASE NOTE: A background check that does not meet the following requirements will be deemed incomplete and could jeopardize the submission status of your application.

- **Background check must include a Social Security Trace** (which scans his/her SSN and lists every county/state of residence where that SSN has been used).
- **Background check must include any additional aliases that have been used by the individual.**
- **Background check must include a completed county level check for any county returned in the Social Security Trace.**
- **Background check must include a completed nationwide check.**

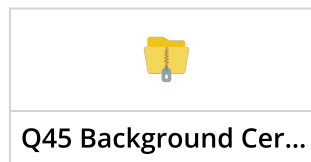
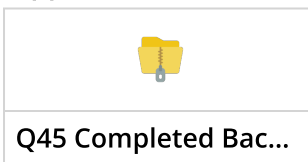
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Total Files Count: 50

Resources



Applicant Evidence :



Uploaded on **4/24/2026** by **Katie Brown**

Uploaded on **5/22/2026** by **Katie Brown**

3.3. Staffing: Hiring, Management, and Evaluation

Q46. Projected Staff: Complete the staffing chart below outlining your staffing projections.

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Resources



Staffing Chart Templ...

Applicant Evidence :



Q46 Staffing Chart E...

Uploaded on **4/24/2026**
by **Katie Brown**

Q47. Explain the board's strategy for recruiting and retaining high-performing teachers.



Recruitment:

Encompass will comply with NC § 115C-218.90, which requires that at least 50% of charter school teachers hold state licensure. Recruitment for Montessori schools poses an extra challenge because in addition to meeting the state required numbers for teachers with state licensure, Encompass must also have lead classroom teachers with Montessori training. In order to meet the school's needs we will follow three paths of recruitment.

1) Recruiting for Montessori trained teachers with or without state licensure:

Encompass will leverage national Montessori networks to publicize employment opportunities and recruit high-quality applicants. The school will use Teach Montessori, a national Montessori job posting board and NCMPS social media, as well as job boards of national Montessori organizations AMI-USA and AMS to advertise positions. In addition, we will recruit locally from the Center for Montessori Teacher Education of North Carolina and the Montessori Association of North Carolina.

Teachers with Montessori credentials who do not have a state license will be encouraged to pursue a state license through NC's Residency Licensure pathway.

2) Recruiting state-licensed teachers and supporting their Montessori training: We will recruit strong teachers who have state-licensure and are interested in getting Montessori training. Depending on numbers needing training, we will support these teachers in earning their Montessori credential either through onsite training cohorts using a MACTE-accredited Public Montessori Teacher Residency model or through other MACTE-accredited training with additional in-house support to make the bridge to the public setting.

3) Supporting a career path for teacher assistants: Wherever possible, we will support teacher assistants (paraprofessional educators) to complete the education and training they need to move into lead teacher positions. In this way, we both build a pipeline of teachers for the school and support homegrown staff longevity with deep connections to the community.

In addition to the Montessori-specific recruiting medium mentioned above, we will utilize multiple mediums (InDeed, NC Teacher Match, school web page, LinkedIn and others) to maintain an ongoing list of resumes. Twice a year, we will invite strong candidates to campus to see and feel our culture, continuing to build relationships with potential employees.



Retention:

Retention: Encompass will be a strong and supportive professional environment where teachers are 1) a part of a high functioning team pulling together toward a common goal 2) given regular opportunities for coaching and professional development 3) invited to play an active role in school leadership and decision-making 4) treated with respect and as professionals, including having the opportunity for regular feedback on their work and 5) compensated through a locally competitive salary and benefits package.

Research shows that most teachers leave their school and the profession because they do not experience success in the classroom (Johnson, S. M., & Birkeland, S. E., 2003). Executing a strong Montessori school where parents are happy and students are joyful and flourishing is the single most important thing Encompass will do and the single most important lever for retention of strong teachers.

Q48.If already identified, describe the principal/head of school candidate and explain why this individual is well-qualified to lead the proposed school.

Not yet identified

Q49.If the school leader has been identified, attach the school leader's one-page resume as Appendix

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Q50.Provide a description of the relationship that will exist between the charter school employees and the school's board of directors.



The Board of Directors will have one direct report, the Executive Director (who will oversee all other school employees). The Executive Director will report directly to the Board President and the board will evaluate the Executive Director using an evaluation framework aligned with Montessori leadership practices, including tools developed by NCMPS. This process blends reflection, stakeholder feedback, and evaluative scoring to promote leadership growth, accountability, and alignment with Montessori principles.

Goals of the Executive Appraisal Process

- Foster authentic leadership grounded in Montessori values
- Provide formative and summative feedback to support continuous improvement
- Align the Executive Director's performance with organizational mission, operational effectiveness, and community engagement
- Enable data-informed decision-making

Core Components

1. Executive Appraisal Instrument (EAI)

- Assesses leadership across **three domains**:
 - **Leading Authentically** (e.g., self-awareness, modeling, mission alignment)
 - **Leading Others** (e.g., communication, facilitation, conflict resolution)
 - **Leading the Future** (e.g., vision, systems thinking, change management)
- Used twice annually in collaboration between the Executive Director and the Board or evaluator
- Identifies areas of strength (scores 6–9) and areas for growth (scores ≤4)

2. Annual Review Portfolio

- A curated body of evidence and reflection, compiled by the Executive Director
- Aligned with four key leadership categories:
 - Organizational Leadership
 - Programmatic Oversight
 - Development, Outreach, and Communication
 - Operations, Facility, and Safety



- Includes both objective documentation (budgets, dashboards, staff evaluations) and reflective narratives
- Used to confirm performance relative to annual goals and to substantiate rubric scores

3. Annual Growth and Accountability Cycle

- **July:** Goal-setting using Reflective Practice Inventory and EAI self-evaluation
- **January:** Semi-annual appraisal using updated scores, observations, and check-ins
- **Spring:** Annual Climate Survey conducted with families and staff
- **July (Year-End):** Full portfolio submission and final evaluation; leads to renewal or intervention decisions

Tools Used Throughout the Cycle:

- Reflective Practice Inventory (self-assessment)
- Climate Survey (stakeholder feedback)
- Executive Appraisal Instrument (joint evaluation)
- Executive Portfolio (evidence and reflection)
- Job Description
- Goal Setting Documents

Q51. Outline the board's procedures for hiring and dismissing school personnel, including conducting criminal background checks.



The Board of Directors will be responsible for hiring and dismissing only the Executive Director, according to the procedures set out in its bylaws. The Executive Director will be hired according to the job description and criteria created by the Board, and will undergo criminal background checks as required by North Carolina law.

The Executive Director will be responsible for hiring and dismissing all other school personnel according to policy that is developed in conjunction with the staff, is in alignment with NC and federal laws, and is approved by the Board. Hiring policies will include, at a minimum, requirements for proof of qualifications (state license and/or Montessori credential, as appropriate), a national criminal background check, a performance evaluation (onsite or by video), a writing sample, and a committee interview). All teachers will be at-will employees who may be dismissed with or without cause and extreme instances of inappropriate conduct may result in immediate dismissal.

At Encompass Montessori, the teacher appraisal process is designed to nurture professional growth while affirming alignment with the school's Montessori mission. Rather than functioning as a traditional top-down evaluation, the process is deeply collaborative and reflective, with a focus on building teacher capacity, cultivating excellence in practice, and fostering long-term retention. Teachers are engaged in a thoughtful cycle that includes self-assessment, goal setting, monthly coaching, and observation. This cycle culminates in a summative appraisal using the Teacher Appraisal Instrument (TAI), a rubric that supports detailed and constructive feedback across four domains: Assessment, Preparation, Invitation, and Protection.

What makes this process unique is its grounding in Montessori principles: respect for individual growth, intentional observation, and a commitment to continuous improvement. Teachers are encouraged to reflect on their own practice using the Reflective Practice Inventory and to partner with the instructional coach in developing personalized growth plans. Through ongoing dialogue, qualitative feedback, and regular classroom visits, the process promotes both high standards and a strong sense of belonging.

At its core, the Encompass appraisal process is not about compliance—it is about fostering joyful, purposeful teaching and ensuring that every educator thrives within a community that values authenticity, curiosity, and professionalism. At the same time, the Appraisal Process can lead to the development of staff improvement plans and



pathways to dismissal in the case of poor performance. This improvement protocol, created by the founding staff and in collaboration with the Executive Director will be approved by the Board and reviewed at regular intervals.

Q52. Outline the school's proposed salary range and employment benefits for all levels of employment.

All pay scales will reflect the NC State approved pay scales (<https://www.dpi.nc.gov/documents/fbs/budget/fy26webschedulespdf/download?attachment>).

Health Care will be provided by a private broker.

Encompass Montessori is committed to supporting the long-term financial well-being of its employees by offering access to a retirement savings plan. Eligible employees will have the opportunity to participate in a qualified retirement plan that allows them to contribute toward their future financial goals. In addition, Encompass Montessori intends to provide a generous employer matching contribution, further supporting employees in building financial security for retirement. Specific contribution details will be determined by the organization and may be reviewed periodically to ensure the benefit remains competitive and financially sustainable.

Q53. Provide the procedures for handling employee grievances and/or termination.



The Executive Director holds ultimate responsibility for terminating employee enrollment. Termination will be conducted in accordance with North Carolina and federal laws, and nothing in this section should be taken to supersede those legal requirements.

The Executive Director will perform regular evaluations of personnel, or delegate evaluations to employees' direct supervisors. Teachers and assistants will be evaluated according to the NCMPS Teacher Appraisal Instruments and Assistant Appraisal Instruments respectively, which help educators align their practices with Montessori principles and the outcomes defined by the school. Appraisal will be constructive and supportive, not punitive.

An employee may be placed on an action plan prior to recommendation for dismissal. An employee's supervisor may make recommendations to the Executive Director regarding an employee's placement on an action plan, progress, and ultimate termination. The final decision rests with the Executive Director.

The Executive Director will establish a grievance procedure for employees' concerns to be heard. Discipline and termination can be appealed to the Board of Directors, whose determination is final.

The school will develop a detailed Employee Handbook that will provide a pathway for staff to follow, which will advise that grievances should always be taken to the immediate individual involved, after that, if not resolved, taken to the next individual up on the organizational chart, until a peaceful, satisfying resolution can be found.

If resolution is not found with the Executive Director, the Board is the top of the organizational chart and the Grievance Committee will hear the matter.

Staff who have not attempted resolution through following this chain of responsibility and action may not bring the matter directly to the Board of Directors unless there are circumstances that prevent them from following the normal procedures for grievance resolution.

Grievances will be addressed through peaceful mediation to reflect the Montessori values of grace and courtesy.



Q54. Identify any positions that will have dual responsibilities and the funding source for each position.

N/a

Q55. Describe the plans to have qualified staffing adequate for serving all student needs including SWD, ML, and AIG students.

Encompass has budgeted for a full-time Exceptional Children teacher starting in Year 1. In Year 2, this number will go up to 2 FTE and continue to grow through hiring staff or contracting with outside providers to meet the need. We plan to add a Counselor and a Health Aide in future years, when the budget allows. Especially during the start-up years as our charter school grows, we will, as with any start-up, hire people who are willing and able to play many roles, either by bringing multiple experiences and licenses with them or by continuing their professional growth and development while at Encompass.

Classroom teachers will be trained through Encompass in how to support multilingual students in the Montessori general education classroom. Encompass will support teachers who don't already have it in receiving training on working with AIG students.

As the school grows and the budget grows, Encompass's numbers for support staff for these populations will also grow.

Q56. How will teachers be evaluated? What system or tool will be utilized?



Encompass will utilize the NCMPS Teacher Appraisal Instrument (TAI) for summative teacher evaluation. The TAI is aligned with Montessori developmental practices and integrates multiple sources of data, including DERS (Developmental Environment Rating Scale) observations, teacher self-assessments, and coaching notes.

The TAI provides a rigorous, summative evaluation of teacher practice across four core domains:

- Assessment
- Preparation
- Invitation
- Protection

Each domain is broken down into observable indicators of teaching behavior that support student growth in executive function, language, and social-emotional development.

Appraisal process:

- Data collection (observations, DERS reports, teacher reflections)
- Scoring of indicators on a 9-point scale
- Aggregation and analysis of scores
- Collaborative reflection and feedback
- Targeted recommendations for professional growth

This cyclical evaluation model promotes ongoing development and honors the complexity of Montessori teaching.

Q57. Provide a narrative detailing the roles and responsibilities, qualifications, and appropriate licenses that each position must have to be hired by the school's board of directors and effectively perform the job function(s).



At Encompass Montessori Charter School, we believe that a strong school community is built on the foundation of qualified, mission-aligned professionals who bring expertise, care, and consistency to every facet of our work. To ensure high-quality instruction and holistic support for our students, we have established clear expectations for the qualifications and responsibilities associated with each staff role. Our hiring philosophy balances the flexibility afforded to charter schools in North Carolina with the rigor and intentionality of the Montessori approach.

The chart that follows outlines the minimum and preferred qualifications for each key role at Encompass—from our Executive Director to support staff and specialists. It also includes a summary of each role’s primary responsibilities, highlighting how every position contributes to a cohesive educational experience grounded in Montessori values. This framework supports thoughtful recruitment, intentional staff development, and a shared understanding of expectations across the school.

By clearly defining qualifications and responsibilities, we aim to cultivate a professional culture that values expertise, encourages continuous growth, and supports long-term retention.

Every team member at Encompass plays a vital role in shaping a nurturing, academically rigorous, and inclusive school environment. Our staffing model reflects not only compliance with state guidance but a deep commitment to the principles of Montessori education and the diverse needs of our public charter school community.

Encompass Montessori Charter School: Staff Qualifications & Responsibilities

Position	Minimum Qualifications	Preferred Qualifications	Roles & Responsibilities
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Executive Director

- Master's in
Education,
Business or
related field

- 3–5 years
leadership
experience

-Charter School
experience

Bachelor's with
10 years
educational
leadership
experience

- Licensure not
required for NC
charters

- Doctorate in Ed
Leadership

- Experience in
Montessori

- Fundraising
experience

- Leads strategic
planning,
fundraising, and
compliance

- Represents
school to the
board and
external
stakeholders

- Ensures mission
alignment and
sustainability

- Balances long-
term financial
viability of the
school with what
is best for the
students

-Testing
coordinator for
year 1 only



Principal			- Oversees the daily operations of the school to ensure a smooth and efficient learning environment
	- Bachelor's degree	- Master's in School Admin	- Provides instructional leadership by guiding and supporting teaching staff in delivering high-quality programs
	- NC Principal License or pathway license	- 3+ years teaching	- Ensures academic practices reflect both Montessori philosophy and compliance with North Carolina state standards
	- SLLA exam	- Montessori certified	
	-1-3 years leadership experience	- Previous public Montessori leadership experience	
		- Charter School experience	



Assistant Principal

- Bachelor's degree in Education or related field
- Eligibility for principal licensure or leadership development program
- Master's in School Admin
- 3+ years teaching
- Montessori certified
- Strong background in instructional leadership and staff supervision
- Previous public Montessori leadership experience
- Charter School experience
- NC Teaching License
- Assists the Principal in managing daily operations and supporting school-wide procedures
- Provides direct support to teaching staff, including observations and feedback
- Helps ensure fidelity to Montessori practices and supports compliance with academic and behavioral expectations
- Coordinates testing



Clerical/ Front Office

-High School Diploma Required, Bachelor's preferred

-Bi-lingual
-Experience working in school environments
-Confident with technology

-Administer NSLP
-Answer phones
-Communicate with parents
-Manage the front office
-Order supplies

Montessori Instructional Coach

- Bachelor's degree in Education or related field

- Montessori certification (MACTE)

- Experience mentoring or coaching educators
- Deep knowledge of Montessori pedagogy
- Montessori public school experience
- NC Teaching License or eligibility

- Supports instructional staff through observation, feedback, and co-planning
- Models effective Montessori practice and classroom leadership
- Facilitates ongoing professional development aligned with school goals and Montessori philosophy



**Core Content
Teachers:**

Kindergarten, Lower
& Upper Elementary

- Bachelor's degree

- NC Teaching License or eligibility (Residency pathway)

- Montessori certification from MACTE-accredited program

- 3+ years of experience

- Prepares and maintains Montessori environment

- Delivers individualized lessons

- Observes, assesses, and adjusts learning plans

- Communicates with families

Core Content

Teachers: Middle School Lang. Arts / Humanities or Math / Science

- Bachelor's degree in subject area

- NC Teaching License or eligibility

- Montessori adolescent training

- Middle/High School experience

- Delivers subject-specific instruction through a Montessori framework

- Designs integrated, project-based curriculum

- Advises students in community-based learning



**Montessori
Teacher Assistants**

- High school
diploma

- Associate degree

- Montessori
Assistant
Certification

- Classroom
experience

- Supports the
Lead Guide in
classroom
management

- Assists with
material
preparation and
observation

- Reinforces
lessons and
supports
transitions

**Exceptional
Children Teacher /
Child Study Lead**

- Bachelor's
degree

- NC license in
Special
Education

- Master's in Special
Ed

- Previous
Montessori
Experience

- Experience with the
NCMPS Child Study
Process

- Develops and
implements IEPs

- Collaborates
with classroom
teachers

- Provides
inclusive and/or
pull-out services

- Communicates
with families and
external providers



**Social Worker /
School Counselor**

- Bachelor's degree in Social Work, Counseling, or related field

- NC licensure (e.g., LCSW, LCMHC, or school counseling license)

- Master's degree in Social Work or Counseling

- Experience working in Montessori or child-centered educational settings

- Provides individual and group counseling

- Supports student social-emotional development

- Collaborates with staff and families to design intervention strategies

- Facilitates community resources and referrals as needed

**Electives /
Specialty Teachers**

- Bachelor's degree in the content area

- NC License in Art, Music, or PE

- Experience with arts/movement integration

- Montessori teaching familiarity

- Delivers engaging, developmentally appropriate arts or PE instruction

- Integrates content with Montessori values

- Supports school-wide performances or wellness activities



Grade Level Lead	- Bachelor's degree in subject area	- Montessori certification from MACTE-accredited program	- Supports instructional staff through observation, feedback, and co-planning
	- NC Teaching License or eligibility	- Montessori Public School Experience - Experience mentoring/coaching	- Models effective Montessori practice and classroom leadership - Facilitates ongoing professional development aligned with school goals and Montessori philosophy

Q58.Id

Q58.Identify the positions responsible for maintaining teacher license requirements and professional development.

Q59.Explain the school's professional development model or plan. The plan should describe how the school will meet the teacher certification and licensure requirements for teachers as prescribed by state and federal law. Be sure this overview matches with the projected staff and funding of the proposed budget section.



At Encompass Montessori Charter School, the professional development (PD) model is designed to ensure that all educators meet North Carolina licensure requirements while being supported to effectively implement a high-quality public Montessori program. The model integrates required compliance training, structured onboarding, and ongoing job-embedded professional learning aligned with both state expectations and the school's instructional approach.

Recruitment will prioritize candidates who hold, or are eligible for, North Carolina teaching licensure. At least 50% of teachers will hold a North Carolina teaching license, with support provided for other teachers to obtain licensure as they are able. Because the school will recruit both locally and nationally, teachers with out-of-state licensure will be supported in transitioning to North Carolina licensure in accordance with state requirements. Teachers who are not yet licensed will be supported through approved pathways, including Residency Licensure, ensuring compliance while maintaining access to a broad and qualified candidate pool.

Encompass will implement a Beginning Teacher (BT) support program aligned with North Carolina requirements and the North Carolina Educator Evaluation System (NCEES). The Principal will serve as the BT coordinator, with the Executive Director fulfilling this role during the initial phase of the school until the position is fully established. Beginning Teachers will be paired with experienced, state-licensed mentor teachers and will receive regular observation, feedback, and support to ensure successful progression toward full licensure.

All staff will complete required trainings in accordance with state and federal law, including mandated reporter training, student safety protocols, health-related certifications, and other compliance-based requirements. These trainings will be provided during pre-service orientation and revisited as required.

Professional development at Encompass is embedded within the school calendar and begins with pre-service training prior to the start of the school year. Ongoing professional learning will be provided through scheduled in-service days, collaborative planning, and instructional support. While the school does not fund full Montessori certification programs, it provides sustained, in-house professional development and ongoing instructional support to help teachers develop Montessori-aligned practices over time. Teachers are encouraged to pursue Montessori certification independently as part of their professional growth.



Professional development funding is included in the school's budget and aligned with projected staffing. This includes support for in-house training, required certifications, and limited external professional development opportunities. An instructional coaching model will be implemented as the school grows, with a dedicated Montessori Instructional Coach position beginning in Year 3. These structures ensure that professional development is both financially sustainable and responsive to the evolving needs of staff and students.

3.4. Staff Evaluations and Professional Development

Q60. Identify the positions responsible for maintaining teacher license requirements and professional development.

Executive Director and/or School Principal: The principal holds the ultimate responsibility for ensuring that all teachers within the school hold valid and appropriate licenses. They often oversee and support professional development initiatives within the school, aligning them with school improvement goals. They also ensure compliance with state and district requirements for both licensing and professional growth.

Assistant Principal: The Assistant principal may have specific responsibilities related to teacher supervision, evaluation, and professional development. They might help organize and facilitate professional learning activities and track teacher compliance.

Montessori Instructional Coach: The Montessori Instructional Coach will work directly with teachers to enhance their instructional practices. They may provide individualized coaching, facilitate professional learning communities (PLCs), and help teachers identify and pursue relevant professional development opportunities aligned with their needs and school goals. They can also help ensure that professional development activities contribute to meeting licensing renewal requirements where applicable.

Grade Level Leaders: Grade Level Leaders facilitate collaborative professional growth and share best practices within a specific Montessori level. They act as a key peer leader, fostering a culture of continuous improvement among their colleagues.

Q61. Provide a detailed plan noting how the school will mentor, retain and evaluate staff in a format that matches the school's mission and educational program. The plan should also describe how the school will meet the teacher certification and licensure



requirements for teachers as prescribed by state and federal law. Be sure this overview matches with the projected staff and funding of the proposed budget section.



Encompass Montessori Charter School will cultivate a collaborative and supportive environment for staff, recognizing their vital role in guiding children through their developmental planes. Grounded in Montessori philosophy, our approach empowers educators through authentic experiences, individualized support, and a commitment to lifelong learning. We will adhere to the highest standards of professional practice, including all teacher certification and licensure requirements as prescribed by North Carolina and federal law.

Encompass Montessori Charter School will ensure that instructional staff meet the licensure and certification requirements for charter schools established by the North Carolina Department of Public Instruction (NCDPI). Teacher evaluation will be conducted in alignment with the North Carolina Educator Evaluation System (NCEES), which will serve as the formal evaluation framework for all licensed staff. Beginning Teachers will participate in a structured BT support program, including mentoring, observation, and feedback, in accordance with state requirements.

At least 50% of lead teachers will:

- Hold a valid North Carolina teaching license, or
- Be actively enrolled in a state-approved alternative licensure pathway.

The school will prioritize hiring certified teachers who also hold Montessori credentials from MACTE-accredited training. Teachers without Montessori credentials will be supported through the Montessori Teacher Residency program or through another MACTE-accredited training.

The proposed staffing model includes:

- Lead Montessori teachers
- Teacher Assistants (1 per classroom)



- Executive Director
- Principal (starting in Year 4)
- Assistant Principal (starting in Year 2)
- Montessori Instructional Coach trained in the NCMPS coaching model (starting in Year 3)
- Exceptional Children Teacher
- Social Worker / Counselor (as budget allows)

These positions are added as the school grows to best serve the students and the budget.

A professional development line item is on the budget to supplement. These investments directly support mentoring, retention, and evaluation, ensuring alignment between our educational vision and financial planning.

Coaching

Central to our mentoring plan is the Montessori Instructional Coach, trained in all components of the National Center for Montessori in the Public Sector (NCMPS) Coaching Model. This holistic model is designed to support the growth and sustainability of public Montessori schools by:

- Providing classroom and school-wide support
- Partnering with school leaders to strengthen systems
- Centering equity and developmentally appropriate practices
- Using data and reflection to drive continuous improvement

Key elements of the NCMPS Coaching Model:

- Holistic Support: Focus on classroom practice, school climate, leadership, and family engagement
- Equity-Focused: Committed to equitable access to high-fidelity Montessori education
- Collaborative Partnership: the Coach works closely with teachers and leaders
- Developmentally Supportive: Practices align with child development principles



- Data-Informed: Observational tools and metrics guide coaching cycles

The coaching relationship is ongoing and embedded in the school culture, with regularly scheduled observations, reflection sessions, and goal-setting conversations.

Tools for Evaluation and Reflective Practice

1. Developmental Environment Rating Scale (DERS)

The DERS is a structured classroom observation tool that measures child and adult behaviors, and environmental attributes aligned with developmental outcomes like executive function, linguistic and cultural fluency, and social-emotional flexibility.

Domains measured:

- Initiation / Concentration
- Inhibitory Control
- Working Memory
- Linguistic / Cultural Fluency
- Social Fluency / Emotional Flexibility

The DERS is used by the instructional coach and school leadership and generates reports which support reflection, coaching, and improvement plans

1. Teacher Appraisal Instrument (TAI)

The TAI provides a rigorous, summative evaluation of teacher practice across four core domains:

- Assessment
- Preparation
- Invitation
- Protection

Each domain is broken down into observable indicators of teaching behavior that support student growth in executive function, language, and social-emotional development.



Appraisal process:

- Data collection (observations, DERS reports, teacher reflections)
- Scoring of indicators on a 9-point scale
- Aggregation and analysis of scores
- Collaborative reflection and feedback
- Targeted recommendations for professional growth

This cyclical evaluation model promotes ongoing development and honors the complexity of Montessori teaching.

1. Reflective Practice Inventories

NCMPS provides inventories for:

- Teachers
- Executive leadership
- School-wide community

These inventories guide educators in self-assessing alignment with Montessori principles and setting professional goals. They are embedded into coaching sessions and professional development to support intentional growth.

Retention Through Growth and Support

Our retention strategy is grounded in creating an environment where educators feel supported, inspired, and invested in. Through:

- Coaching partnerships
- Data-informed reflection
- Peer collaboration
- Access to Montessori credentialing support
- Leadership opportunities

...educators are encouraged to grow professionally while contributing meaningfully to our shared mission.



Q62. Describe the core components of the professional development plan and how these components will support the 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.



At Encompass Montessori Charter School, the professional development (PD) plan is intentionally designed to reflect our commitment to authentic public Montessori implementation, equity, and child development. The plan is multi-tiered, blending internal and external supports and offering a balance between uniform foundational training and individualized pathways for growth.

Core Components of the Professional Development Plan

1. Foundational Montessori Orientation

- All staff (including untrained teachers, teacher assistants, leaders, and support personnel) will participate in Montessori Fundamentals for Everyone, an introductory course from the National Center for Montessori in the Public Sector (NCMPS). This ensures a shared philosophical foundation across all roles and prepares the adult environment for collaboration and fidelity.

2. Montessori Teacher Preparation

- Lead teachers who have not previously completed a MACTE-accredited Montessori certification program, will be supported in completing Montessori Teacher Residency (MTR) MACTE-accredited training as available and appropriate, or other MACTE-accredited training. This job-embedded training includes coursework, coaching, and a practicum in the classroom, allowing teachers to implement while learning.
- Teachers who have already completed a MACTE-accredited Montessori certification program will participate in the Public Montessori Bridge Program, a program tailored for teachers who wish to teach in a public Montessori environment. The Public Montessori Bridge for Teachers is a curated professional development pathway for Montessori educators seeking to bridge the gap between their Montessori training and the needs of the public sector. These seven courses include Multilingual Learner Support, What Montessori Teachers Need to Know about Special Education, Integrating Standards, and more.

3. Support for Teacher Assistants

- Teacher assistants will receive training through NCMPS's Montessori Assistants Training and Montessori Classroom Teaming courses. These help



assistants understand their role in supporting the prepared environment and collaborating with lead teachers.

4. Coaching and Reflective Practice

- A certified Montessori Instructional Coach, trained in the NCMPS coaching model, will provide individualized, ongoing support. Coaching includes:
 - Observation and feedback using the Developmental Environment Rating Scale (DERS).
 - Goal-setting and cycles of reflection.
 - Support with classroom routines, lesson delivery, and behavior guidance.
- Teachers will engage in structured reflective practice using inventories such as the Teacher Reflective Practice Inventory, identifying areas of strength and growth within the Montessori framework.

5. Ongoing Assessment and Improvement

- The Teacher Appraisal Instrument (TAI) will be used for summative evaluation. TAI is aligned with Montessori developmental practices and integrates multiple sources of data, including DERS observations, teacher self-assessments, and coaching notes.
- Teachers and leaders will use data from observations and assessments to create personalized Teacher Growth Plans, guiding further PD.

6. Workshops and Specialized Training

- Ongoing professional learning will be conducted throughout the year using internal workshops and external offerings through NCMPS. Topics include:
 - Child Study Training (for MTSS/RTI within Montessori).
 - Assessment Playbook Tool Study (for observation-based progress monitoring).
 - Multilingual Learner Support in Montessori Classrooms.
 - What Montessori Teachers Need to Know About Special Education.

Delivery: Internal vs. External, Individualized vs. Uniform



- Internal PD will include coaching, team-based learning, PLCs, and staff reflection meetings facilitated by the Montessori Instructional Coach and school leaders.
- External PD will include formal coursework and workshops offered by NCMPS.
- Uniform PD will ensure that all staff understand Montessori philosophy and school-wide practices through shared onboarding and school culture training.
- Individualized PD will be informed by reflective practice inventories, coaching goals, and teacher appraisal outcomes. These personalized growth plans will ensure that each educator receives the specific support they need.

Q63. Provide a schedule and explanation of professional development that will take place prior to the 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.



This professional development schedule ensures that educators are not only well-prepared for the school year but also have the tools they need to support both individual students and the classroom community as a whole. All required trainings will also be provided, including mandated reporter training, child first aid/CPR, EpiPen administration, and other required certifications.

How Teachers Will Be Prepared:

1. **Collaborative Environment:** Through the Montessori Classroom Teaming course, teachers will build a collaborative mindset, learning how to effectively communicate and support one another in a Montessori classroom setting. They'll develop strategies for managing the unique dynamics of a multi-age classroom and work together to foster an environment of mutual respect.
2. **Comprehensive Understanding of Montessori:** Teachers will gain a strong foundational understanding of Montessori principles through the Montessori Fundamentals for Everyone course. This prepares them to implement Montessori methods in the classroom, from lesson delivery to classroom organization.
3. **Observation and Assessment Skills:** The Assessment Playbook Tool Study will provide teachers with practical tools and strategies to observe and assess students in ways that are consistent with Montessori principles. This training helps educators document progress and tailor their approach to meet each child's unique needs.
4. **Focus on Executive Function:** By attending Executive Function and Montessori, teachers will learn how Montessori practices support the development of executive function skills in children, such as focus, self-control, and organizational abilities. They will be equipped with strategies to nurture these skills in their students, ensuring long-term success both inside and outside the classroom.

Professional Development Schedule:

Week 1: Montessori Fundamentals and Classroom Teaming

- **Day 1-2: Montessori Fundamentals for Everyone**
 - **Duration:** 2 days (12 hours total)
 - **Overview:** This session will provide all staff with a deep introduction to the core principles of Montessori education, the philosophy behind it, and an understanding of the key components that make a Montessori classroom unique.



- **Content:**
 - Introduction to Montessori principles (e.g., respect for the child, self-directed learning)
 - Overview of the Montessori materials and their purpose
 - The role of the teacher as a guide
 - The prepared environment and how it fosters independent learning

- **Day 3-4: Montessori Classroom Teaming**
 - **Duration:** 2 days (12 hours total)
 - **Overview:** This session focuses on fostering a strong, collaborative team dynamic among Montessori educators, assistants, and other support staff, which is vital for ensuring a cohesive and efficient classroom environment.
 - **Content:**
 - Team-building exercises to improve communication and cooperation
 - Role definitions and responsibilities of teachers and assistants
 - Collaborative problem-solving and strategies for maintaining consistent routines
 - Conflict resolution and fostering an atmosphere of mutual respect and trust among team members

Week 2: Assessment and Executive Function

- **Day 5: Assessment Playbook Tool Study**
 - **Duration:** 1 day (6 hours total)
 - **Overview:** This session will focus on Montessori-friendly tools and strategies for observing and assessing student progress, an essential part of the Montessori method.
 - **Content:**
 - Observation techniques that align with Montessori principles



- Tools for documenting children's developmental progress
 - How to track academic and social-emotional growth
 - Creating individual learning plans based on assessments
-
- **Day 6: Executive Function and Montessori**
 - **Duration:** 1 day (6 hours total)
 - **Overview:** This session will delve into how Montessori education naturally supports the development of executive function skills (planning, problem-solving, self-regulation, etc.), which are crucial for lifelong learning and success.
 - **Content:**
 - Understanding executive function and its importance in child development
 - Montessori strategies that nurture self-regulation and independent thinking
 - Integrating executive function-building activities into the daily classroom routine
 - Practical examples of how to help students develop essential cognitive skills

Q64. 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.



Professional Development Overview:

Throughout the school year, the professional development schedule should be structured to balance between enhancing educators' skills, supporting their continuous growth, and ensuring the smooth functioning of the Montessori classroom. This plan takes into account the school's calendar, daily schedule, and staffing structure to create a sustainable and effective development plan.

Expected Number of Days/Hours for Professional Development:

- **Total Hours for Professional Development:** 40-50 hours per year (depending on the school's specific needs and calendar).
- **Breakdown:**
 - **Core Courses (e.g., Visual Thinking Strategies, Child Study Training, Lesson Study Training, Multilingual Learner Support, and Special Education):** 24-30 hours (spread across the year)
 - **1:1 Coaching and Support:** 4-6 hours per teacher (per month)

Professional Development Courses and Focus Areas:

1. Visual Thinking Strategies (VTS):

- **Total Hours:** 4-6 hours annually
- **Schedule:** 1-2 sessions of 2-3 hours each
- **Overview:** This course will focus on enhancing students' observation, critical thinking, and communication skills through VTS.

2. Multilingual Learner Support in Montessori Classrooms

- **Total Hours:** 4-6 hours annually
- **Schedule:** 1-2 sessions of 2-3 hours each
- **Overview:** Focuses on strategies and adaptations for supporting multilingual learners, with practical tools for integrating language support in



Montessori methods.

3. What Montessori Teachers Need to Know about Special Education:

- **Total Hours:** 4-6 hours annually
- **Schedule:** 1-2 sessions of 2-3 hours each
- **Overview:** This course addresses how to integrate special education strategies and practices into Montessori classrooms, focusing on how to create an inclusive environment for all learners.

4. Child Study Training:

- **Total Hours:** 2-4 hours monthly
- **Schedule:** 2-4 sessions of 1 hour each
- **Overview:** This support meeting focuses on understanding individual children's developmental needs and how to document and assess their progress.

5. Lesson Study Intensive:

- **Total Hours:** 2-4 hours monthly
- **Schedule:** 2-4 sessions of 1 hour each
- **Overview:** A Montessori-based approach to collaborative lesson planning. The sessions will focus on designing, practicing, and reflecting on lessons together, fostering a team approach to refining instructional practices and supporting diverse learning needs.

6. 1:1 Coaching and Support:

- **Total Hours:** 2-6 hours monthly
- **Schedule:** 30 minutes to 1 hour
- **Overview:** Individualized coaching support will be provided to teachers, focusing on areas where they need additional guidance. This will also include feedback on lesson planning, classroom management, and handling specific student needs.

Accommodating the Plan within the School Calendar, Daily Schedule, and Staffing Structure:

1. School Calendar:



- **Professional Development Days:** The school will schedule 4-6 days throughout the year dedicated to professional development. These will be spaced out, ideally during breaks (e.g., mid-year or pre-term). These days will focus on core courses like Visual Thinking Strategies, Child Study Training, and special education integration.

2. Daily Schedule:

- **Integrated PD Time:** In addition to dedicated professional development days, the school can allocate 1-2 hours per month during scheduled staff meetings or professional collaboration times. This can be used for brief training or to review core concepts from courses.
- **Team Collaboration Time:** The school will provide opportunities for team meetings, where teachers can collaboratively discuss how to implement learnings from their professional development into their classrooms. This time will be incorporated into their regular working hours.

3. Staffing Structure:

- **Mentorship & Coaching:** The school will assign a senior Montessori educator or Montessori Instructional Coach to each teacher for one-on-one coaching sessions. These coaches will work with teachers to provide personalized feedback and help with lesson planning, assessment strategies, and handling diverse learning needs.
- **Team Leaders for Collaborative PD:** For collaborative courses like the Lesson Study, team leaders or the Montessori coach will facilitate the sessions, encouraging teachers to share experiences and best practices.

Supporting Implementation:

- **Time for Reflection:** Teachers will be given time to reflect on the professional development they've received, through both group discussions and written reflections. This will help solidify learning and allow them to implement changes gradually.
- **Ongoing Support:** Throughout the school year, additional support via online resources or check-ins with mentors will be available, ensuring teachers continue to feel supported as they integrate new strategies into their practice.



This plan ensures that professional development is both intensive and sustainable, balancing teachers' development with their day-to-day teaching responsibilities.

3.5. Student Recruitment

Reaching the full capacity for enrollment will be critical to obtaining 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 115C-218.45 carefully.

Q65. Marketing Plan: 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.



Our work in reaching out to families in Wake County is well underway. We launched encompassmontessori.org without promotion or a social media push, and we are already receiving interest forms from families. These forms will be added to a database that we will utilize as one component in our multi-platform marketing plan.

Digital marketing campaigns with regular communications to prospective parents will continue over the summer, alongside regular website updates. We have assembled a calendar of community events in eastern Wake County, including the Knightdale farmers market, Meet on Main in Wendell, Rock the Block in Zebulon, and Downtown Concerts in Clayton. Setting up tables at these events will allow us to connect directly with local families and build our list of prospective students.

Community and relationship-based marketing are the most effective forms of marketing, in order to establish brand awareness, loyalty and build trust. With a school, especially for the youngest age children, establishing trust in our ability to effectively educate and care for the children who come to Encompass Montessori is critical. Getting to know us directly and learn from our expertise is one of the best ways to do that.

To increase our student enrollment from under-resourced communities, we will leverage Board Member Karyn Farmer's existing relationship with the Zebulon Boys & Girls Club (ZBGC) who provides before and after care programs for families at a deeply discounted rate. They are serving financially insecure households in our target area. We will host information sessions at ZBGC, provide materials for the families to learn about our school, and develop a pilot program to provide transportation from their location to ours for families who need transportation services in-conjunction with the wraparound care. This will support our recruitment in and service the communities of the greatest need. We are also exploring a partnership with the YMCA to provide transportation to and from their before and after school programs.

We have launched a Facebook page to meet parents where they are, so we can create a forum to share Montessori practices that can be employed at school and at home to help us reach our target demographic of families with young children.

Once the charter is in hand, we will employ geocaching ads to specifically drive traffic towards the website and social channels.



The school seeks to reflect the community it serves and will conduct dedicated outreach to families in historically Black communities, Spanish-speaking families, and families with low socioeconomic metrics. Our online approach will be supplemented with mailers that will be targeted to specific neighborhoods to be able to garner more interest from those specific communities.

Our community-based marketing plan will have a robust on-ground program as well. With plans to hire the Executive Director as soon as possible, their first order of business will be to connect with the community for listening sessions. Additional information is in the start-up section, but building trust involves getting to know your neighbors and what they dream of for their children. When we listen, we learn. Taking that knowledge to refine our outreach will make our marketing and enrollment efforts even more effective.

Q66. Describe how parents and other members of the community will be informed about the school.

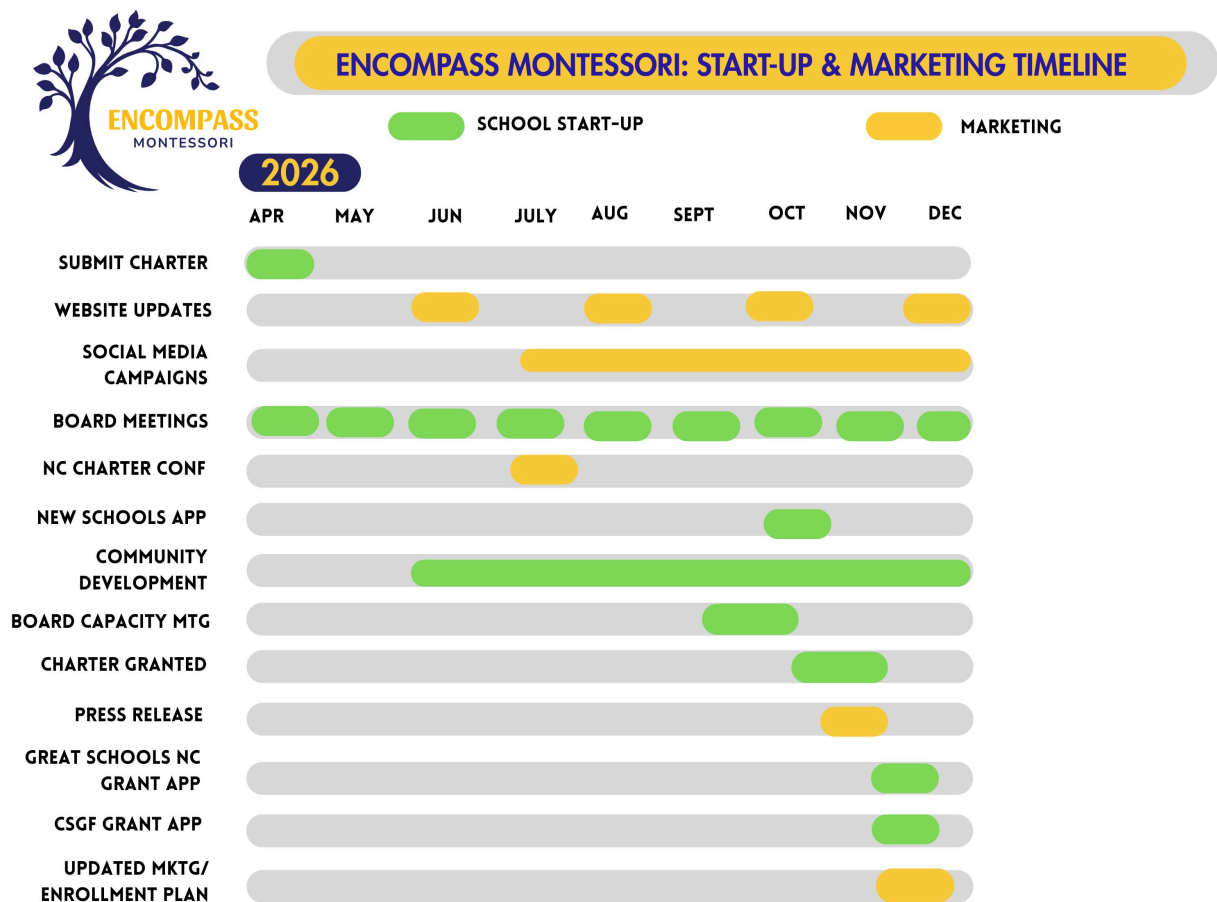
We will utilize social media, our website, mailers, and host listening events and celebratory community gatherings. Informational sessions at local churches, libraries and parks, as well as individual meetings with local business and government leaders will ensure we are introduced to the community as a welcome addition. We will staff a table at community events and farmers markets to allow families to get to know Encompass and our mission. We will also place ads and/or announcements in the Eastern Wake News local paper to introduce ourselves to the community and announce upcoming enrollment and community events that we host. Joining parent groups online will also allow us an opportunity to directly connect with local families about Encompass Montessori.

Q67. Describe your plan to recruit students during the planning year, including the strategies, activities, events, and responsible parties.



We will have a booth at the farmer's market, attend local community events like the Fall on First Avenue and Harper Hour, and the August Arts & Educational Festival, to name a few options. We've already subscribed to the "Knightdale Knewsletter" to keep current with all the community happenings and have been regularly attending community events in Knightdale and Zebulon.

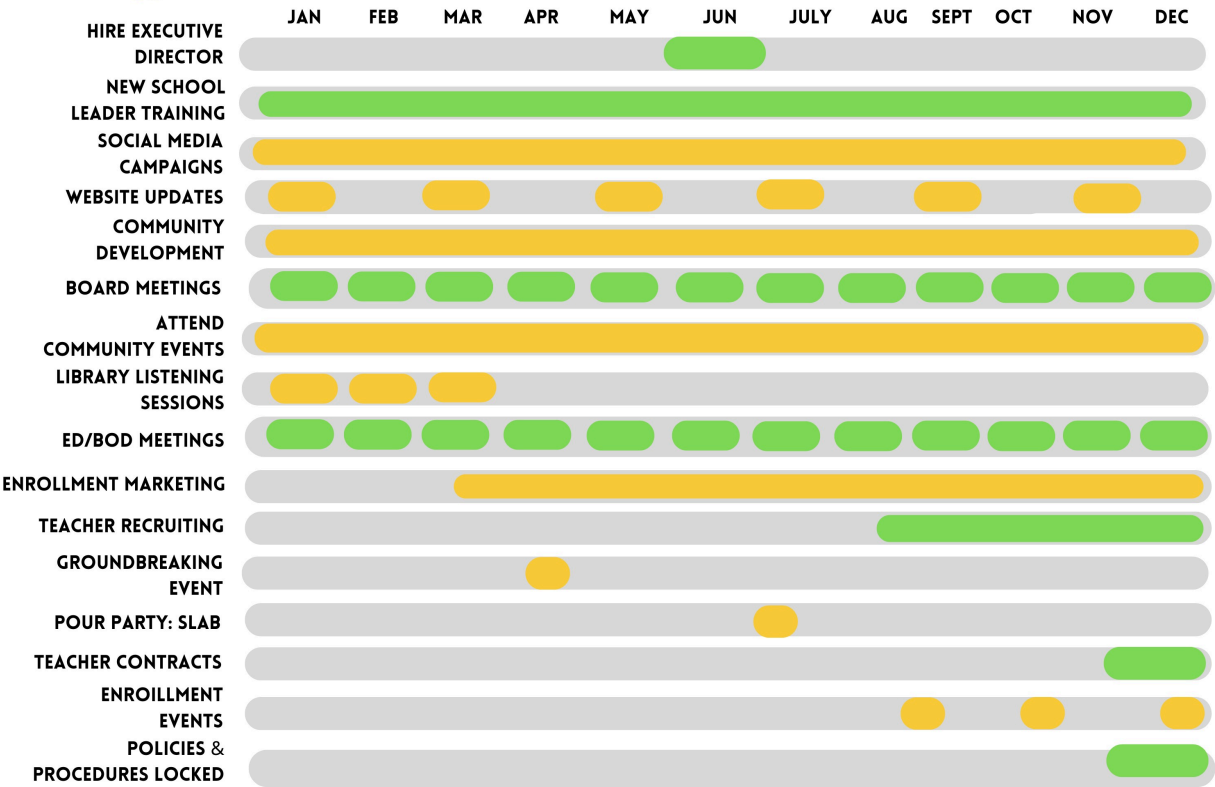
Below is the Marketing and Start-up Timeline, which highlights ongoing community efforts alongside specific targets. Also below is a sample events calendar for the upcoming year that we will attend to build our community and recruit students.





ENCOMPASS MONTESSORI: START-UP & MARKETING TIMELINE

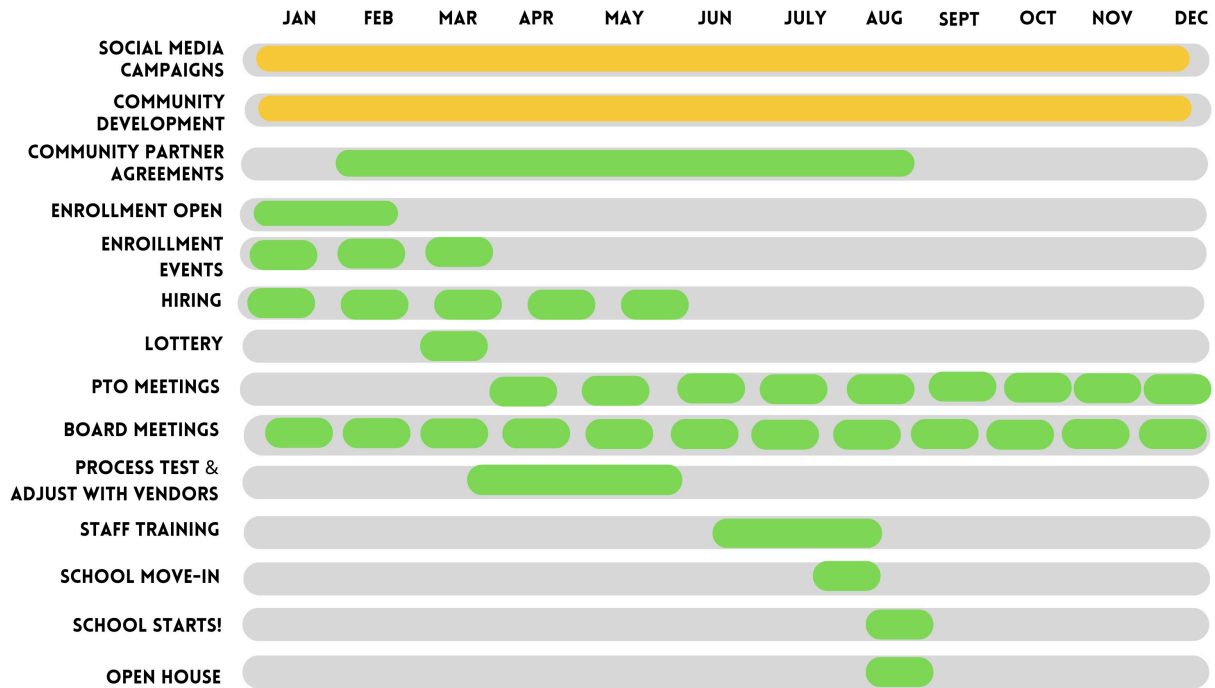
2027





ENCOMPASS MONTESSORI: START-UP & MARKETING TIMELINE

2028



We currently have intent to enroll forms for 26 prospective students, which is 18% of our enrollment goal for Fall of 2028 and 63 followers on our new Facebook page.

Online engagement is up 100%, and we have logged 2449 views and 141 click-throughs.

Below are the most recent 30-day snapshots of engagement.



Last 28 days ▼

Mar 26 - Apr 22

2,449 Views ⓘ

↑19K% from previous 28 days



3-second views 0 >

1-minute views 0 >

Viewers 872 >



Last 28 days ▼

Mar 26 - Apr 22



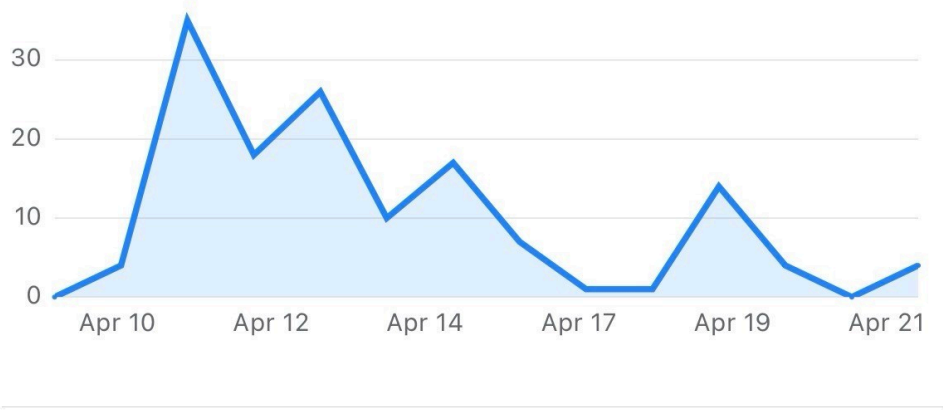
We're introducing Fan insights to the Engagement tab! If you have fans, you can find more information about them here.

[Learn more about Fan engagement.](#)



141 Engagement ⓘ

↑100% from previous 14 days





Last 28 days ▼

Mar 26 - Apr 22



We're introducing Fan insights to the Engagement tab! If you have fans, you can find more information about them here.
[Learn more about Fan engagement.](#)



141 Engagement ⓘ

↑100% from previous 14 days



Q68. Describe how students will be given an equal opportunity to attend the school. Specifically, describe any plans for outreach to: families in poverty, academically low-achieving students, students with disabilities, English learners, and other students at-risk of academic failure. If your school has a specific area of focus, describe the plan to market that focus.



A Montessori education is particularly well-suited to students with disabilities and students who do not thrive in a traditional public school education. By cultivating our community based on real practicums and connections, we can demonstrate for parents that a learning environment that naturally supports diversity in all aspects can best support their children.

We will be providing materials in Spanish for our outreach into multilingual communities and will be targeting specific underserved neighborhoods and populations with our print and online marketing, using geocaching.

Q69. What established community organizations would you target for marketing and recruitment?

We will eagerly pursue partnerships within the local business community to ensure the school has robust support and that employees, entrepreneurs, and their friends and family will know Encompass Montessori as a school who is looking to become an important community partner for all the children. This one-to-one approach with local businesses and organizations like the YMCA, Boys and Girls Club, churches, Chamber of Commerces, preschools, homeschool groups and local realtors will give us a wide swath of supporters.

We will also target Head Start Preschool providers to introduce them to the time-tested Montessori approach and host informational sessions for the families, to ensure we are pulling from a socioeconomically diverse base of families. We also have connected with the YMCA to reach the families in our target area to ensure we are reaching all demographics.

We are developing a strong working relationship with the local government officials as a top priority, so we model being engaged community members for our students. This will pave the way for enriching student experiences, like visits from the firefighters or the K-9 police unit.

3.6. Parent and Community Involvement

Q70. Describe how you will communicate with and engage parents and community members from the time that the school is approved through opening.



As stated in the Marketing Section, “we will utilize social media, our website, mailers, and host listening events and celebratory community gatherings. Informational sessions at local churches, libraries and parks, as well as individual meetings with local business and government leaders will ensure we are introduced to the community as a welcome addition. We will staff a table at community events and farmers markets to allow families to get to know Encompass and our mission. We will also place ads and/or announcements in the Eastern Wake News local paper to introduce ourselves to the community and announce upcoming enrollment and community events that we host. Joining parent groups online will also allow us an opportunity to directly connect with local families about Encompass Montessori.”

Our website has already begun accepting interest forms, and we will have a monthly email newsletter, regular social media posts, and custom curated content to introduce families to the Montessori method and to our school. Developing this online community will establish us as a community resource.

Encompass will use the ParentSquare platform in order to communicate with and engage parents and community members from the time that the school’s charter is approved through the school’s opening. Families will be invited to create accounts on the platform and will receive general updates about the school, be provided information like dates for open houses, information about applications and lottery results, and they will see requests for volunteers, for example.

Once Encompass opens, families will be able to view general information about the whole school (open houses/back to school night, fundraisers, parent/teacher organization meeting announcements, board meeting minutes). Families will also be able to view information about individual classrooms (monthly newsletters, going outs/field trips, announcements).



Families can communicate back with the school or individual teacher through the messaging feature. Families will receive notification of messages/announcements via the ParentSquare app, through email or through text message.

Q71. Describe how you will engage parents in the life of the public charter school.

Strong connections between children's lives outside school and their lives at Encompass are foundational to student success. Our plan for engaging parents in the life of our public charter school is designed to create a welcoming, collaborative environment where families feel valued, informed, and empowered to actively support their children's learning journey. We will cultivate these engaging partnerships through a variety of initiatives throughout the school year. These programs and events will be calendared prior to the school year's beginning and communicated to families so that preparations (transportation arrangements, sitters, extracurricular activity obligations) can be considered and made. These events will be staffed by teaching teams and school leadership; therefore, teaching staff will have the opportunity to give input on the programs and chances to provide feedback about each of the events after they have concluded. Staff feedback and suggestions will be considered in future planning, calendaring of dates and other logistics of the programs in which we engage. Encompass will have no fewer than four family engagement opportunities per year, with the hopes of holding these events with more confidence and frequency as the school matures.

Q72. If already identified, describe any programs you will offer to parents and/or the community and how they may benefit students and support the school mission and vision.



Pre-School Year Engagement: Building Connections from the Start

Family Work Day (Before School Begins): To foster a sense of ownership and community from the outset, we will host a Family Work Day prior to the start of the school year. This hands-on opportunity will invite families to contribute directly to preparing the school for the children's arrival. Activities will include campus clean-up, interior organization, making learning materials, and setting up classroom environments under the guidance of the lead teacher and teacher assistant. We will also actively seek to leverage the unique skills and specialties of our families, whether it's gardening expertise for our outdoor spaces or professional skills that can contribute to specific projects. This not only provides practical assistance but also allows parents to connect with each other and the school staff in a meaningful way.

Home Visits or 1:1 Meetings for Kindergarten Students (Before School Begins): Recognizing the significant transition into kindergarten, we will conduct home visits or offer individual meetings for incoming kindergarten students and their families before the school year begins. This personalized approach will allow teachers to build an early rapport with students in a comfortable setting, understand their individual needs and backgrounds, and answer any questions parents may have. It sets a positive tone for the school-family relationship and helps ease the child's transition into the school environment.

Ongoing Engagement Throughout the School Year:

Open House (Fall Semester): Early in the fall semester, we will host a comprehensive Open House. This event will provide parents with an opportunity to tour the school facilities, meet teachers and staff, learn about the curriculum and educational program, and understand the school's mission and values. It will be a crucial platform for establishing initial connections and fostering a sense of belonging.

Establish Parent/Teacher Organization (PTO) (Fall Semester): Within the first semester, we will actively work to establish a vibrant and representative Parent/Teacher Organization (PTO). We will clearly outline the purpose and goals of the PTO, emphasizing its role in fostering communication, supporting school initiatives, and organizing parent engagement activities. We will encourage broad participation from all families and ensure that the PTO leadership reflects the diversity of our school community.



Regular PTO Meetings (Throughout the School Year): The PTO will hold regular meetings throughout the school year, providing a consistent forum for parents to stay informed about school happenings, contribute their ideas and feedback, participate in decision-making processes (where appropriate), and collaborate on school-wide events and fundraising efforts. Meeting formats will be varied and accessible to accommodate different schedules and preferences.

Silent Journey (Winter): The Silent Journey offers a unique opportunity for parents to experience a Montessori school day in the life of their child. Parents will rotate through the exploration and use of various Montessori materials, engaging with the materials in a silent, observational manner. This provides a powerful insight into the child's daily experience, fostering empathy and a deeper understanding of the school's pedagogical approach. It often sparks rich conversations between parents and teachers afterward.

International Day of Peace Observance (Spring): Engaging families in our school-wide observances promotes a shared sense of values and community. The International Day of Peace observance will provide an opportunity for students and families to learn about and celebrate peace through various activities, performances, or discussions. This inclusive event encourages cross-cultural understanding and strengthens the connection between home and the school's broader mission.

Student-Led Conferencing (Spring): This initiative will invite families into the classroom to participate in learning activities alongside their children. This direct involvement provides parents with firsthand experience of the Montessori method, lesson presentations and independent work with materials, allowing them to better support their child's learning outside of the Montessori environment. This time together between the child's caregiver and child also fosters a sense of partnership and shared responsibility for student progress.

End of Year Celebration: To culminate the school year and celebrate student achievements, we will host an engaging End of Year Celebration that may include student music performances or a talent show. This joyful event provides a relaxed and informal setting for families, students, and staff to connect, reflect on the year's accomplishments, and build positive memories associated with the school.

Through these multifaceted initiatives, we aim to create a school culture where families are not just spectators but active and valued partners in their children's education. We will strive to honor adults' time and schedules and provide diverse opportunities for



engagement. These events will foster open communication, and be agents in recognizing the unique contributions of our families. By doing so, we will build strong partnerships that directly strengthen support for student learning and contribute to the overall success of our public charter school community.

3.7. Admissions Policy

Q73. Weighted Lottery Does your school plan to use a weighted lottery? 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.
2. A lottery process may not be based upon geographic boundaries, such as zip code or current public school attendance zones, unless the charter school is operated by a municipality OR the charter school was converted from a traditional public school. Municipal charter schools may give enrollment priority to domiciliaries of the municipality in which the school is located (G.S. 115C-218.45(f)(7)), and charter schools that were converted from traditional public schools shall give admission preference to students who reside within the former attendance area of the school (G.S. 115C-218.45(c)).
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.

☒ Yes

☐ No

Q74. 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



Encompass will hold a lottery in the event we receive more applications than there are available seats in order to fulfill our mission of providing an “effective, proven, and child-centered K-8 public Montessori program” to the variety of families in Wake County.

To increase the enrollment probability of economically disadvantaged children, we will use a weighted lottery system. The use of this weighted lottery and preferences is directly related to our school's commitment to serving the community and its objective to achieve economic diversity within the school community. The use of this lottery ensures Encompass is acting with intentionality to serve children who are furthest from opportunity.

Q75.2) A thorough description of the processes and procedures the applicant intends to use to effectuate the lottery.

Encompass Montessori will strive for socioeconomic diversity by strategically allocating seats during enrollment. School leaders will determine the number of available seats for Economically Disadvantaged (ED) students in each class or program, with the goal of achieving a school-wide free and reduced lunch enrollment that reflects the ED student population of Wake County at the time of the lottery (recognizing that this number may change over time).

Encompass Montessori will use a separate form to determine student eligibility for ED status. This form will be optional for the families to complete and they will only need to provide the data necessary for Encompass to verify students' status as Economically Disadvantaged (qualifies to receive free and reduced lunch).

Q76.3) The underlying research, pedagogical, educational, psychometric, and legal, that supports the request and the procedures the applicant is requesting.



Guided by our commitment to provide equitable opportunities for Economically Disadvantaged students, who may experience resource limitations, Encompass proposes a weighted lottery with a percentage of seats allocated for students eligible for this designation. This decision reflects our understanding of research showing the Montessori model's power to elevate and equalize child outcomes, particularly for children with limited access to resources (Fleming & Culclasure, 2024 (<https://amshq.org/wp-content/uploads/2024/11/fleming-exploring-public-montessori-ed-ja.pdf>); Lillard et al., 2017 (<https://www.frontiersin.org/journals/psychology/articles/10.3389/fpsyg.2017.01783/full>)). Moreover, Encompass values diversity as a vital component of a thriving learning community, with research confirming its positive impact on students' academic achievement and social-emotional development. Montessori education fosters a global perspective through cultural studies, and diversity is crucial for a rich learning experience. A student body that reflects our community is essential to fulfilling our mission of providing a high-quality Montessori education.

Q77. 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 withdrawals and transfers.



Recruitment will commence upon receiving final approval of our charter from the State Board of Education. Encompass will recruit children and families using a variety of media and channels, including:

- Information sessions at local libraries, churches, and community centers
- The school website
- Social media posts
- Community ambassadors
- Attending community events
- Outreach to local childcare facilities
- Multilingual marketing materials

Enrollment at Encompass Montessori will be open to all students eligible to attend North Carolina public schools, and the school will not discriminate on the basis of race, ethnicity, national origin, religion, gender, disability, or academic ability.

These recruitment activities are designed to orient prospective students and families to Encompass's mission and vision, share information about Montessori education, and promote understanding of the lottery and enrollment process, including important deadlines. Participation in any recruitment or informational activity is optional and will not be required for admission or influence a student's chances in the lottery.

The open enrollment application period will begin in January and run through February, with the lottery to be held in March. Precise dates and times of the application period will be defined and published annually. The enrollment application will be made available in both digital and paper formats, in the top three languages of the area, which are currently English, Spanish, and Mandarin. Information requested on the application will include child and family names and contact information, student age and grade level, and information about eligibility for any applicable lottery preferences.

In accordance with NCGS 115C-238.29F(g)(5a), Encompass will honor the following lottery preferences:

- Children or grandchildren of school staff employed at .75 FTE or greater and the board of directors, up to 15% of the school's total enrollment
- Siblings of currently enrolled students
- Siblings of students who have completed the highest grade level offered by that school and who were enrolled in at least four grade levels offered by the



charter school or, if less than four grades are offered, in the maximum number of grades offered by the charter school

- Students who were enrolled in a preschool program operated by Encompass Montessori in the prior year.

At the conclusion of the open enrollment period, Encompass will run its enrollment lottery in compliance with NCGS 115C-238.29F(g)(6). The lottery, which will be open to the public, will be randomized and completed by computer software. Each applicant will have an equal chance of selection within their grade level, with lottery preferences applied in accordance with North Carolina law prior to random selection. Parents of participating applicants will be notified of acceptance or non-acceptance following the conclusion of the lottery. Applicants who are offered seats will receive directions and deadlines relative to registration. Applicants who are not offered seats will be placed on a waiting list in lottery number order. The waiting list will remain active through the school year for which the lottery is conducted, and families will be contacted in order of their lottery number as seats become available. If a student withdraws or declines an offer of enrollment, the next student on the waitlist will be offered a seat.

Intent to re-enroll forms will be distributed to all enrolled families annually in January in order to determine the number of seats available for each grade level in the following year's lottery. Families who do not submit an intent to re-enroll form by the stated deadline may forfeit their seat, which may then be offered to a student on the waiting list.

Students are required to notify the school if they are moving, or if they otherwise intend to withdraw from the school. Upon student withdrawal, the seat may be offered to the next student on the waiting list. For students transferring into Encompass, records from the student's previous school will be requested upon receipt of all enrollment paperwork. All student records will be transferred in accordance with state and federal requirements, and withdrawals or transfers will not be subject to any penalty.

Our enrollment plan is to create organic growth, with students primarily matriculating from one grade to the next as depicted in the attached chart.



Applicant Evidence :


Q77 Encompass Mo...

Uploaded on **4/23/2026**
by **Katie Brown**

3.8. Certify

Q78. This subsection is entirely original and has not been copied, pasted, or otherwise reproduced from any other application.

- ☒ Yes
- ☐ No

Q79. Explanation (optional):



4. Acceleration

The Charter Schools Review Board (CSRB) may accelerate the mandatory planning year for a charter applicant that meets the following requirements: agrees to participate in the planning year while the charter application is being reviewed without any guarantee of charter award; and demonstrates that there is a facility identified by the applicant that is feasible for opening on an accelerated schedule. Applicants must know and indicate their intended timeline for opening upon application. Accelerated applications seeking to change timelines following application submission may not be automatically granted approval to standard timeline applications. Please review the requirements carefully before selecting accelerated timeline.

Q80. Do you want your application to be considered for acceleration?

- ☐ Yes
- ☒ No



5. Conversion

Q94. Is this application a conversion from a traditional public school or private school?

- ☐ Yes
- ☒ No



6. Replication

Per NC Administrative Code 16 NCAC 06G .0512, the Charter Schools Review Board (CSRB) may, in certain well defined instances, grant permission for a nonprofit corporation board of directors (board) to replicate either its own successful model or to employ an educational management company (EMO) or a charter management organization (CMO) to replicate a successful model currently being operated under the management of the EMO or CMO. The CSRB may also, in certain well-defined instances, grant permission for a nonprofit corporation board to "fast track" such a replication by foregoing the planning year normally required for newly-approved charter applicants.

If applying for a replication, please review the following definitions and continue in this section.

1. "Charter school model" or "model" mean the mission as defined in the charter application and function of a charter school, including its governance, its curriculum, its organizational structure, its targeted population, and other key characteristics of the school, such as small class size, thematic academics, and extended day.
2. "Successful model" means a charter school model that meets the eligibility requirements in Rule .0513 of this Section.
3. "Replication" means the act of copying, recreating, or repeating, a successful charter school model. A "replication" requires the utilization of one charter school "model" to form the creation of a new charter school.
4. "Fast-Track Replication" is a special form of replication in which the approved applicant forgoes the planning year required of new charter school applicants.

Q109. Do you want this application to be considered for standard or fast-track replication? Standard, Fast-Track, or No.

- ☐ Standard
- ☐ Fast-Track
- ☒ No



7. Alternative

In order to qualify for designation as an "alternative school" for purposes of accountability under this administrative code the charter school must demonstrate that it serves a student population as follows:

- The school must include grades 9-12.
- At least 75% of the school's population in grades 9-12 must be at-risk of academic failure as defined in 16 NCAC 06G .0518 and must also meet one or more of the following:
 1. the students shall either be released from a juvenile justice facility within the last year, or otherwise be subject to and participating in the juvenile justice court;
 2. the students shall be currently served by a treatment facility licensed pursuant to Chapter 122C of the General Statutes, or have been discharged from such a facility within the last year;
 3. the students shall be currently under suspension for more than 10 days from a public or private school; or
 4. the students shall be high-school dropouts as defined in Subparagraph (a)(2) of this Rule; or be "Student Chronic Absentee(s)" as defined in 16 NCAC 06E .0106.

Q121. Do you want your application to be considered for an Alternative Charter School?

- ☐ Yes
- ☒ No



8. EMO/CMO

1) A "Charter Management Organization" (CMO) is a nonprofit organization that operates or manages one or multiple charter schools by centralizing support and operations. (2) An "Education Management Organization" (EMO) is a for-profit organization that contracts with new or existing public-school districts, charter school districts, and charter schools to operate and manage one or multiple charter schools by centralizing support and operations.

Q124. Does the Charter School plan to contract for services with an "educational management organization" or "charter management organization"?

- ☐ Yes
- ☒ No



9. Remote Academies

§ 115C-218.120(a). Remote charter academies.

A charter that includes a remote charter academy may do any of the following:

- (1) Provide only remote instruction to enrolled students served by the charter in accordance with this Part.
- (2) Provide remote instruction to students enrolled in the remote charter academy and provide in-person instruction to other students served by the charter.
- (3) Provide enrolled students both remote instruction and in-person instruction. **A student who receives more than half of the student's instruction through remote instruction shall be classified as enrolled in the charter's remote charter academy.**

Q142.

Is the school you're applying to create a remote charter academy?

- ☐ Yes
- ☒ No



10. Mission Purposes, and Goals

The mission and vision statements, taken together, should:

1. Identify the students and community to be served;
2. Illustrate what success will look like; and
3. Align with the purposes of the NC Charter School Law.

10.1. Mission and Vision

The mission and vision statements, taken together, should:

- Identify the students and community to be served;
- Illustrate what success will look like; and
- Align with the purposes of the NC Charter School Law.

Q169. Please state the mission statement of the proposed charter school (recommend 35 words or less). A school's mission statement should be a concise, formal declaration that articulates the school's fundamental purpose, core values, and educational philosophy. It serves as a guiding statement that defines what the institution stands for, whom it serves, and what it aims to accomplish.

To provide Wake County families with an effective, proven, child-centered K-8 public Montessori education in a safe and supportive environment, so students can flourish and become community-centered leaders.

Q170. Please state the vision statement of the proposed school. A school vision statement is a forward-looking declaration that describes the school's aspirational goals and paints a picture of what the institution hopes to become or achieve in the future. While a mission statement focuses on the school's current purpose and how it operates, a vision statement articulates the desired future state and long-term impact.



Our vision is for a school that brings the promise of fully implemented Montessori education to the children and families of eastern Wake County.

Montessori is a 100+-year-old educational approach deeply valued by families all over the world, many of whom pay dearly for the model and make sacrifices so their children can attend. Many more children and families have no possibility of accessing this transformative model. We envision bringing this opportunity to the area, where public Montessori programs are far out of reach and even private, tuition-based programs are far away.

Families choose Montessori because they see how it is rooted in a deep respect for children's natural curiosity, drive to learn, and developing independence. They seek out a model where children's curiosity and creativity are nurtured and allowed to flourish as they grow into their full potential. Encompass Montessori will operate as a public school, open to all without regard to income, cultural background, or ability, and which will enact North Carolina's educational vision of creating "lifelong learners with the capacity to engage in a globally-collaborative society" (North Carolina Department of Public Instruction. 2025. State Board of Education).

We will know that Encompass Montessori is fulfilling its mission when:

- The school retains 90-95% of students and families
- Families report positive results on an annual family survey
- Kindergarten is fully enrolled each year, based on word of mouth recommendations
- Classrooms are places where children are engaged and teachers are staying and learning
- The school is staffed with a pipeline of well-prepared teachers through the Montessori Teacher Residency

Students are growing academically and socially based on assessment guidelines from the A-Game Framework (https://www.public-montessori.org/wp-content/uploads/2024/10/NCMPS_Assessment_Guidelines_for_Authorizers.pdf).

Q171. In narrative form, please describe how you have assessed parental demand for the school.



According to the town's website, Knightdale is continuing to show steady growth, growing around 2.6% each year, with planned, approved developments of more than 1200 units/homes in the works. The town's website (<https://www.knightdalenc.gov/economic-development/education>) boasts a growing list of educational options available for residents, noting that Wake County Public Schools serves this area. Interestingly, however, the charter schools listed as alternatives to Wake County schools are all located in Wake Forest and Raleigh, requiring drives of at least 30 minutes for parents. Parents' willingness to prioritize their children's education and drive to seek educational opportunities is evidence that they will embrace high quality education options like our charter school as well. At the same time, longitudinal enrollment data for these nearby charter schools (see Q177) suggests that families may not be satisfied with these options.

To gather specific data, our intent to enroll form is live, and we currently have 18% of our goal for Fall 2028. We also have 26 prospective students, which is 18% of our enrollment goal for Fall of 2028 and 66 followers on our new Facebook page, which is experiencing high growth, with 2449 views.

Q172. Attach Appendix A: Evidence of Community/Parent Support. Please summarize your evidence in a narrative format with evidence such as the number of community events, flyers associated with events, etc..

1. Evidence should include, at a minimum, the following information:
2. Type of contact (e.g. survey, community event, speaking event)
3. Date of contact
4. Number of attendees
5. Indication of demand based on contact (e.g. 120 survey responses indicating interest; 1000 followers on social media account)

******Do not include personal information of interested families. Do not include surveys/petitions/signatures. Please summarize your evidence rather than provide personal information from survey responses or forms.***



On March 27, 2026, Encompass Montessori was introduced to the business community at the Zebulon Chamber of Commerce Annual Gala, *Boardwalk Bash*, attended by approximately 140 individuals. As part of a featured door prize opportunity, the Chamber's Executive Director formally introduced Encompass Montessori, providing valuable visibility among local leaders and stakeholders. During this event, we engaged in meaningful conversations with approximately 40 business owners, many of whom expressed interest in supporting our efforts—particularly in relation to land acquisition and community partnerships. Notably, we initiated a promising dialogue with a highly respected business leader in Eastern Wake County regarding potential assistance in identifying suitable land. We are currently working to schedule a follow-up meeting to further explore this opportunity.

Building on this momentum, on April 9, 2026, we attended the Zebulon Chamber of Commerce *Business After Hours* event at Auto Direct in Zebulon—just one day after officially joining the Chamber. During this event, Executive Director John Saffold provided a strong introduction, and Alexis Weddings was given the opportunity to present Encompass Montessori and engage directly with attendees. Approximately 40 business owners were present, and the response was overwhelmingly positive. Attendees expressed strong enthusiasm for expanding educational options in Eastern Wake County, with particular excitement surrounding the introduction of a Montessori model—currently not available within close proximity.

Looking ahead, we are committed to maintaining a consistent and visible presence throughout the region. We will continue to actively participate in monthly Chamber events, including *Business After Hours* and *Coffee Connections*, as well as other networking opportunities across Eastern Wake County and other surrounding areas. These engagements are a key component of our strategy to build relationships, increase awareness, and establish Encompass Montessori as a trusted and valued community partner.

In addition, we are expanding our outreach through participation in large-scale community events. On April 25, 2026, we will attend Zebulon's Spring Fest, which is expected to draw approximately 800 attendees. Later in the year, we plan to participate in Zebulon's *Candy Cane Lane* in November, the Wendell Harvest Festival on October 3, 2026 (with anticipated attendance exceeding 10,000 and over 100 vendors), and the Clayton Harvest Festival on October 24, 2026, which typically attracts around 30,000 attendees. These events provide critical opportunities to engage directly with families, community members, and potential supporters.



We have also been mustering parent and community support digitally, through our website and Facebook page. We currently have intent to enroll forms for 26 prospective students, which is 18% of our enrollment goal for Fall of 2028 and 66 followers on our new Facebook page. Online engagement is up 100%, and we have logged 2449 views and 141 click-throughs. The most recent 30-day snapshots of engagement are attached.

Through sustained, strategic engagement at both business and community levels, Encompass Montessori is actively building a strong foundation of local support. We are committed to continuing this outreach across Eastern Wake County and surrounding areas to ensure long-term success and meaningful impact for the families we aim to serve.

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Applicant Evidence :

		
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Q173.If applicable, provide evidence of any committed business, civic, or other community support.

Encompass Montessori has received letters of support from:

- A councilor for the town of Knightdale
- The executive director of the Zebulon Chamber of Commerce
- 22 Beacon
- Hubrich Contracting
- Epic Change Education
- The Zebulon Chamber of Commerce Young Professionals; and
- Local business owners



Applicant Evidence :



Uploaded on **4/24/2026**
by **Katie Brown**

Q174. **Select one or more of the six legislative purposes the proposed charter will achieve.**

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

Q175. **For each purpose selected above, provide a brief narrative explaining how this school will meet that objective and the associated goals of the applicant.**



Create new professional opportunities for teachers, including the opportunities to be responsible for the learning program at the school site: As teachers must earn a Montessori credential for the age level they will teach, Encompass has concrete plans to create a Montessori Teacher Residency on site. Not only will newly hired teachers not have to go to training centers that are far away from their homes, they will learn the method through participating in job-embedded training at the school's location. By hiring and training folks who reside within the community and/or are actively engaged locally, Encompass will be providing professional development and career paths for those who opt for this educational method. Additionally, experienced Montessorians who come to Encompass will have professional growth opportunities to serve as mentor teachers and even teacher instructors in the Residency Program, helping to shape a new generation of Montessori public school teachers.

Provide parents and students with expanded choices in the types of educational opportunities that are available within the public-school system: Within the geographic area that Encompass plans to work in, opportunities for families and students to attend a publicly-funded K-8 Montessori program do not currently exist. Encompass' chartering and opening would provide access to high quality Montessori education for children of these school ages. Once families have made this academic choice, they will be able to create and foster relationships with teaching staff for the duration of their child's time in the kindergarten, lower elementary, upper elementary and adolescent communities for the entire 9 year learning cycle. Additionally, families would not need to consider a new school and all that that entails until their child(ren) matriculates into their high school years.

Improving student learning: Encompass offers a distinct approach to education with the potential to significantly improve student learning across multiple areas. Research has shown that Montessori education cultivates strong executive function skills, which include self-regulation, working memory, planning, and inhibitory control (Lillard, A. et al. 2021. An Association Between Montessori Education in Childhood and Adult Wellbeing (<https://www.ncbi.nlm.nih.gov/pmc/articles/PMC8656358/>)). These skills are not only associated with academic achievement but also predict positive life-long outcomes. Montessori classrooms are shown to foster positive social development. Children in these environments tend to exhibit better social problem-solving abilities, a stronger sense of community and social justice, more positive perceptions of classmates, and the use of constructive social strategies.



Academically, Montessori education has been linked to higher levels of self-regulation, a trait closely associated with academic success. Montessori students also demonstrate increased intrinsic motivation and engagement in academic tasks. In terms of specific subject areas, children in Montessori classrooms have shown strengths in various aspects of language development, including phonological decoding, letter-word identification, reading assessments, sentence structure, and writing creativity. In addition, these students have shown higher scores in mathematics, particularly in applied problem-solving, understanding math concepts, and on standardized tests (Snyder, A., Tong, X., & Lillard, A. 2022. Standardized Test Proficiency in Public Montessori Schools (<https://www.tandfonline.com/doi/full/10.1080/15582159.2021.1958058>)).

From a very young age, Montessori education demonstrates benefits. Montessori preschool and kindergarten programs have been shown to enhance school readiness, with children displaying strengths in traditional measures such as phonological decoding, letter-word identification, and math skills. Encompass will foster well-rounded skill development in students, inclusive of academic, social, and executive function skills. The A-Game Framework (https://www.public-montessori.org/wp-content/uploads/2024/10/NCMPS_Assessment_Guidelines_for_Authorizers.pdf) provides a comprehensive outline for how Montessori charter schools like Encompass can capture student growth and development across academic and non-academic outcomes.

Increasing learning opportunities for all students, with a special emphasis on at-risk or gifted students: The National Alliance for Public Charter Schools presented data at the 2025 National Charter Schools Conference demonstrating that Montessori is one of the highest-performing charter school models in the US. Specifically, reading outcomes are particularly strong for students receiving special education services. Angeline Lillard at University of Virginia has done research demonstrating that public Montessori early childhood programs “elevate and equalize” outcomes for children from low-income families. (Lillard et al., 2017 ([https://www.frontiersin.org/journals/psychology/articles/10.3389/fpsyg.2017.01783/full?cmpid=ema:nws:EqualEd_\(12-03-17\)](https://www.frontiersin.org/journals/psychology/articles/10.3389/fpsyg.2017.01783/full?cmpid=ema:nws:EqualEd_(12-03-17)))). Using NC’s Economically Disadvantaged Student lottery preference will ensure these families have access to an enriching education. Our K-8 model will bring stability, and personalized learning that ensures that each child’s unique abilities and learning styles are met, counteracting the one-size-fits-all approach



that exacerbates disparities in traditional settings. We will utilize the Child Study Protocol, a tiered system of support, to ensure that students who need intervention, and ultimately special education services, are identified and served in a timely fashion.

Encourage the use of different and innovative teaching methods: Encompass Montessori Charter School is dedicated to providing a dynamic educational environment through the implementation of diverse and innovative teaching methods. A cornerstone of this approach will be the use of three-year age spans and mixed-age grouping, a hallmark of Montessori education, which naturally fosters peer teaching, collaborative projects, and individualized learning to accommodate various developmental stages and learning styles. Recognizing the multitude of learning profiles within each classroom, Encompass Montessori will prioritize individualized instruction, an approach inherent in the Montessori environment.

Teachers will receive support to effectively meet the individual academic and social needs of all students. The school will also adopt a “push-in” model for delivering services to multilingual learners and students with special needs, integrating interventionists’ services and instruction into the general education classroom to promote collaborative learning. This combination of instructional methods, employed by both interventionists and well-trained Montessori teachers and assistants, will provide a strong foundation for children to thrive within their individual learning environments.

Because the student community will be composed of students with varying linguistic assets, Encompass expects its staff to utilize varied teaching methodologies that support language acquisition and content learning in multiple languages, including strategies such as peer-to-peer language sharing. The school will lean heavily on Montessori principles and research-based practices by ensuring teachers are well-trained in Montessori pedagogy and engage in ongoing professional development to integrate both traditional Montessori methods and contemporary educational innovations.

Q176. Educational Need and Targeted Student Population of the Proposed Charter School Does the school plan to provide services to certain targeted subgroup(s), if so please explain? Provide a description of the 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. Additionally, how it will



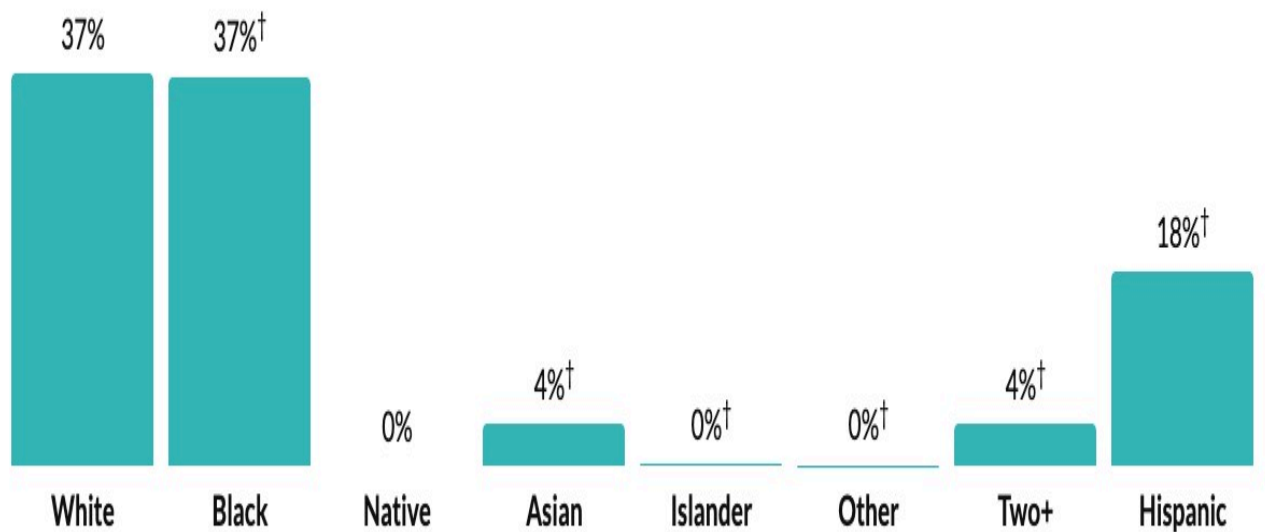
reflect the socioeconomic status of the LEA, SWD population, and MLL population of the district? See G.S. 115C-218.45(e)

(https://www.ncleg.net/EnactedLegislation/Statutes/PDF/BySection/Chapter_115C/GS_115C-218.45.pdf).



Our targeted population includes the residents of Knightdale, Garner and Wendell in eastern Wake County, which collectively have the following demographics:

Race & Ethnicity



* Hispanic includes respondents of any race. Other categories are non-Hispanic.

[Show data / Embed](#)

Source: Census Reporter (<https://censusreporter.org/profiles/79500US3701204-wake-county-east-raleigh-city-east-knightdale-garner-north-towns-puma-nc/>)

To ensure that our population accurately reflects the population and socioeconomic makeup of eastern Wake County, we will utilize the Economically Disadvantaged Student lottery preference. Based on current Wake County Public School System data (Wake County Public School System. 2025 (<https://www.wcpss.net/domain/100>)), approximately 42% of students are economically disadvantaged. We will track enrollment patterns annually to ensure representation at or above this benchmark.



In Wake County, the current population of students with disabilities is nearly 13%. Encompass Montessori is committed to enrolling and serving a comparable population by ensuring strong outreach to families of students with disabilities. We will include clear communication in enrollment materials about how Montessori pedagogy aligns with inclusive education principles, including multi-sensory, hands-on work, individualized instruction and flexible pacing—core elements that support learners with diverse needs. Encompass will also partner with local service providers and early intervention programs to help families connect with and understand the offerings of our program.

With nearly 13% of Wake County students being multilingual learners, our goal is to reflect the same linguistic diversity within the school. Outreach will be supported through culturally and linguistically responsive marketing and emphasizing the importance of oral language development in Montessori pedagogy when recruiting families. The Montessori model's use of concrete materials, rich spoken language, mixed-age classrooms, and small group instruction makes it particularly effective for multilingual learners and allows students to build academic vocabulary and language skills in an immersive and supportive environment. We will also build relationships with community organizations serving immigrant and refugee families to ensure our school is seen as a welcoming and affirming option.

To further ensure Encompass Montessori is meeting its goal to faithfully serve the racial and ethnic diversity of the area, our marketing efforts will also approach historically Black communities and create materials in Spanish, using input from local leaders and community partners to guide authentic, sustained outreach efforts.

Additional ways in which Encompass Montessori will provide intentionally accessible and inclusive outreach is through:

- Community-based partnerships
- Information sessions in the community
- Explaining Montessori in plain language
- Highlighting supports for multilingual learners and students with disabilities embedded in Montessori
- An accessible application process
- Hiring diverse staff
- Building trusting, responsive relationships



With outreach focused on these areas, more students from these areas naturally apply. When we make concerted efforts to build relationships and seek out connections, families will feel more comfortable.

As we develop our interest list, we will reach out to individual leaders in their communities to understand their community's needs better, and with our listening sessions, we aim to create a proactively welcoming environment for multilingual learners and students with disabilities.

Q177. What are the enrollment trends and academic performance outcomes of surrounding schools in the selected community? What elements of your educational model will meet the needs of your target student population?



We examined historical enrollment data for the following Wake County Public Schools elementary schools, located in and around our target area:

- Carver ES
- Forestville Rd ES
- Knightdale ES
- Lake Myra ES
- Lockhart ES
- Wakelon ES
- Wendell ES
- Zebulon ES

As well as enrollment data for the following nearby charter schools:

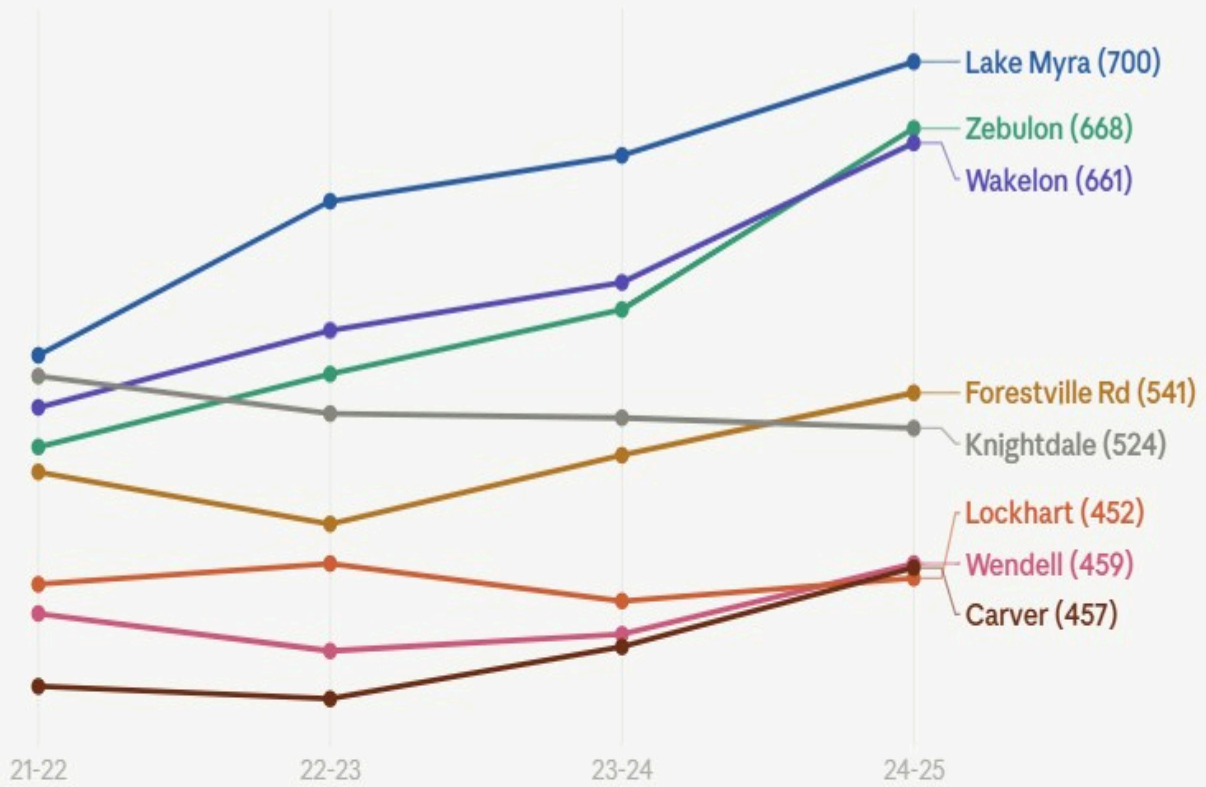
- Cardinal Charter Academy at Wendell Falls
- East Wake Academy
- PreEminent Charter
- Johnston Charter Academy

Enrollment data from 2021-2022 through 2024-2025 indicates two clear trends: first, enrollment in these WCPSS schools is growing. This reflects the economic development and population growth currently taking place in eastern Wake County. This pattern reflects increasing demand for elementary school seats in eastern Wake County, particularly in communities experiencing rapid residential growth and school capacity pressures. Second, for three of the four charter schools, enrollment is declining. Since these are choice schools, this may indicate that existing charter options are not fully meeting the preferences and needs of families in this region, creating space for a distinct, high-quality public Montessori option.

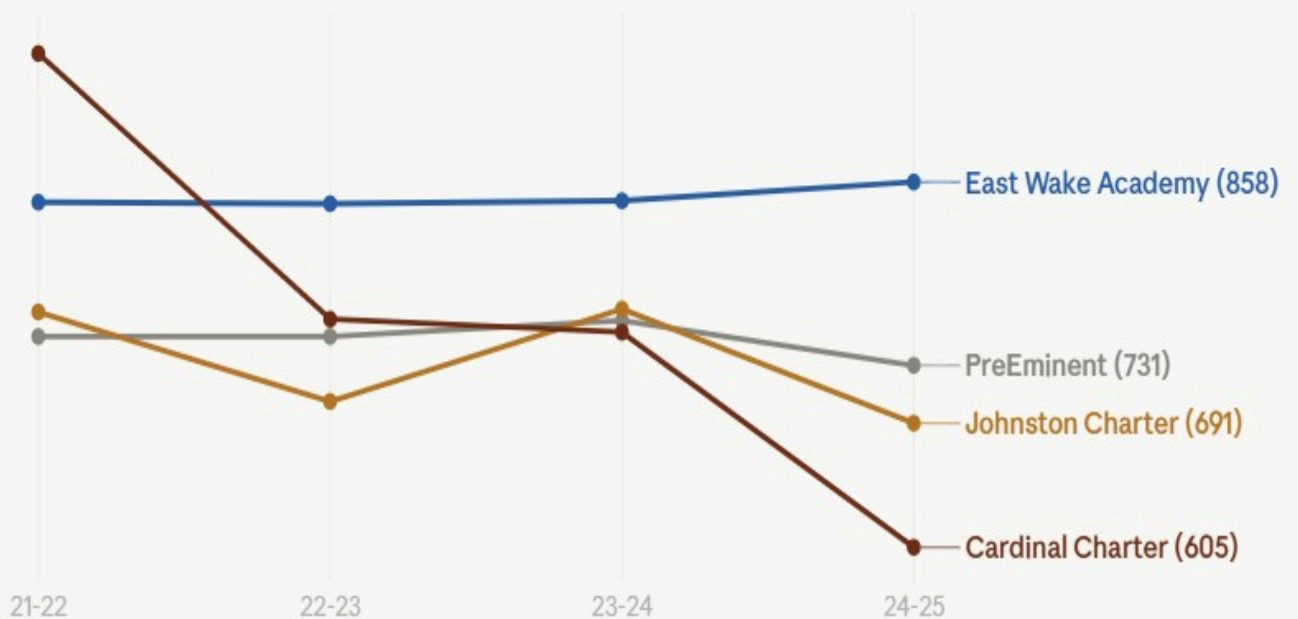


Eastern Wake County Enrollment Trends 2021-2025

Traditional schools



Charter schools





Academic performance outcomes from these schools suggest that students in this area are not being served as well as they could be. Academic achievement data from the North Carolina School Report Cards for each school is compiled below.

Academic performance data shown below is drawn from the North Carolina School Report Cards for the 2024–2025 school year, using school-level End-of-Grade (EOG) subject grades in reading and math.

School	24-25 EOG Math Grade	24-25 EOG Reading Grade
Carver ES	C	D
Forestville Road ES	D	D
Knightdale ES	D	D
Lake Myra ES	C	D
Lockhart ES	C	D
Wakelon ES	B	C
Wendell ES	D	D



Zebulon ES	D	D
Cardinal Charter Academy at Wendell Falls	D	C
East Wake Academy	B	C
PreEminent Charter	D	D
Johnston Charter Academy	C	C

Across this group of schools, a clear pattern emerges: most schools earned C or D grades in reading and math, with reading performance particularly low across several district elementary schools. While a small number of schools demonstrate stronger outcomes, the overall trend suggests that many students in this area are not yet achieving at high levels of academic proficiency, especially in foundational literacy skills.

These trends point to two primary needs in the target community: (1) a growing demand for high-quality school options in a rapidly expanding region, and (2) stronger instructional approaches that improve early literacy and mathematical understanding. Encompass Montessori is specifically designed to address both of these needs through a research-based, child-centered model that supports deep learning and academic growth.

Elements of the Montessori model will meet the needs of students in the target with a focus on individual needs, hands-on learning, and a supportive environment. This provides a comprehensive approach to education that empowers students to become self-directed, lifelong learners. Inherent in the model's design is the meeting of the natural, developmental needs of children by providing a structured yet flexible learning environment that fosters curiosity, exploration, and a lifetime love of learning. Importantly, these elements are not only aligned with child development, but are



intentionally designed to improve academic proficiency outcomes by strengthening foundational literacy, conceptual understanding in mathematics, and sustained student engagement.

Meeting Student Needs through Core Montessori Principles:

- **Prepared Learning Environment:** The Montessori approach emphasizes a carefully designed environment that fosters exploration and discovery. This caters to the inherent human drive to learn by providing stimulating materials and activities that are developmentally appropriate.
- **Individualized Learning:** Honoring the uniqueness of each child, the model allows for individualized pacing and learning styles. Students will progress at their own rate and areas in which they need more support will receive attention through re-presentation, collaborative learning with peers of various ages and independent practice. This ensures that students who are below grade level receive targeted support, while advanced learners continue to progress, improving overall proficiency outcomes.
- **Concrete Learning Materials:** The use of hands-on, concrete materials allows young learners to grasp abstract concepts through direct experience, which aligns with their developmental needs for sensorial exploration. This approach is particularly effective in mathematics, where students build deep conceptual understanding before transitioning to abstract problem-solving.
- **Mixed-Age Classrooms:** The three-year age groupings promote peer learning, social development, and mentorship opportunities. This fosters a sense of community and allows children to learn from each other.
- **Uninterrupted Work Periods:** The extended work periods enable deep focus, concentration, and engagement in learning activities, allowing children to fully immerse themselves in their work and develop self-regulation skills.
- **Montessori-Trained Teachers:** This will be an important feature of our program as the guidance from trained teachers ensures that the curriculum is implemented authentically. Students will receive guidance that is in line with the Montessori philosophy.
- **Freedom within Limits:** This principle encourages autonomy and self-direction within a structured environment, fostering intrinsic motivation and a love of learning.
- **Developmentally Appropriate Stages:** By aligning learning experiences with the predictable stages of human development, the Montessori method ensures that children are challenged and supported at the right time.
- **Proven Results:** The data indicating that fully implemented Montessori programs can lead to academic performance equal to or exceeding that of local



peers reinforces the effectiveness of the model.

Encompass Montessori will provide a high-quality public school option that directly responds to the academic and enrollment needs of eastern Wake County, with a program intentionally designed to improve student proficiency, engagement, and long-term success.

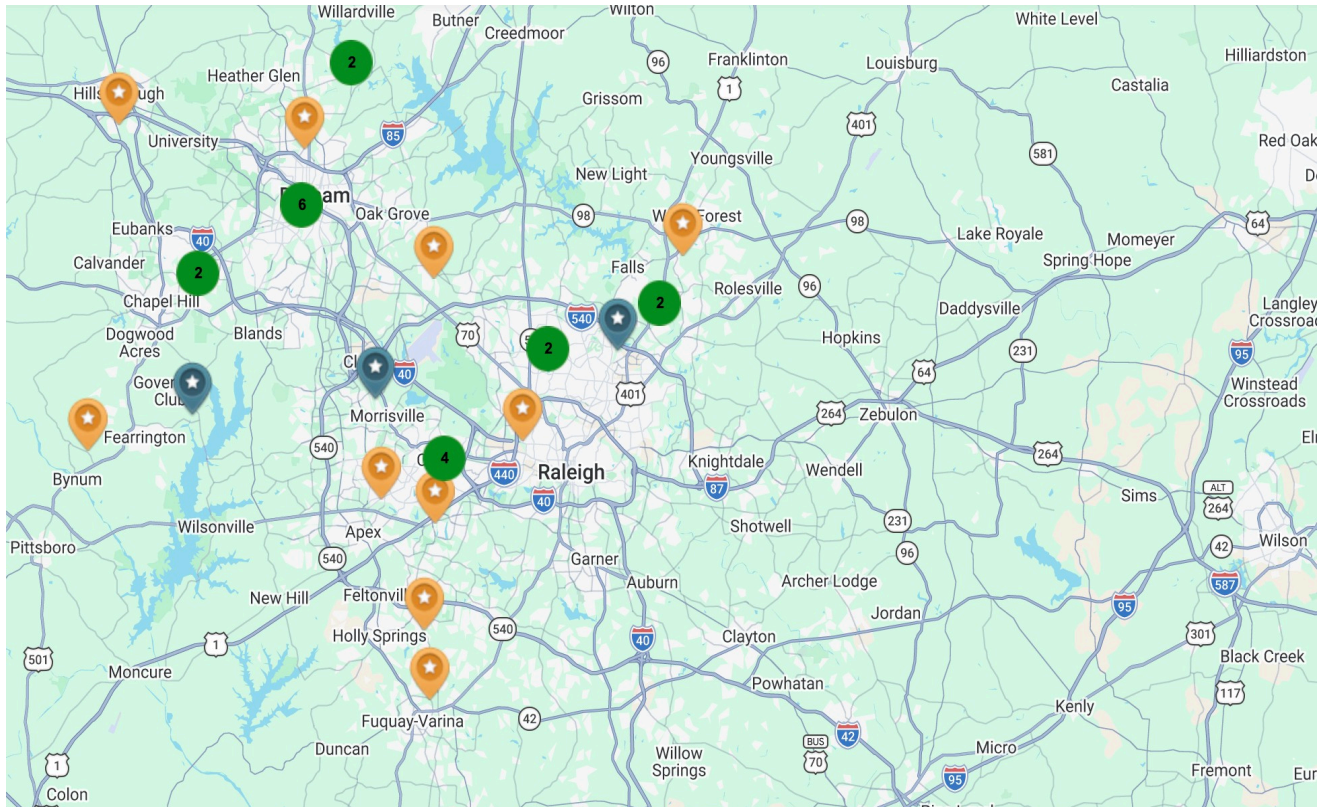
Q178. What will be the total projected enrollment at the charter school and what percentage of the Average Daily Membership (ADM) does that reflect when compared to the Local Education Agency (LEA) of the same offered grade levels? (i.e. If the proposed school will be grades 9-12, only compare the total enrollment to the total enrollment of the LEA in grades 9-12).

The total projected enrollment of Encompass Montessori Charter School is 864 students in grades K-8. As Wake County Public Schools LEA offers instruction for the same grade levels, Encompass Montessori's ADM would be .01% of Wake County Public Schools' ADM. (864/161,115) (Wake County Public School System. 2025. District Facts (<https://www.wcpss.net/about-us/facts-and-figures>))

Q179. Summarize what the proposed school will do differently than the surrounding schools serving the same population of students. What will make this school unique and more effective than the currently available public-school options?



Encompass Montessori Charter School will bring the constructivist, child-centered Montessori model, which is overwhelmingly popular in other parts of the region and the state, to eastern Wake County. While families in the western half of the county have an assortment of public and private Montessori schools to choose from, this map of Montessori schools from the Montessori Census (<https://montessoricensus.org/>) reveals a stark discrepancy in access:



Encompass Montessori Charter School is designed to thoughtfully address persistent challenges in eastern Wake County, including rising income inequality, school overcrowding and attendance instability, unequal access to educational resources, and cultural and linguistic barriers. Through a multi-faceted approach rooted in the Montessori method, Encompass will offer an accessible, stable, and affirming learning environment where all students can thrive.

Unlike conventional public schools that primarily rely on geographic zoning, Encompass will leverage North Carolina's Economically Disadvantaged Student (EDS) lottery preference and fully embrace the flexibility charter schools offer to enroll students from across the state. This proactive enrollment strategy is designed to expand access for students from under-resourced communities, many of whom have historically been



excluded from Montessori education. In a region where significant disparities in household income persist—with White families earning nearly twice as much, on average, as Black families—our approach is purposefully designed to expand equitable opportunities to a broader, more diverse student population.

Following an introductory Montessori year in Kindergarten, students progress into **Lower Elementary** (Grades 1–3) and **Upper Elementary** (Grades 4–6), advancing through hands-on, interdisciplinary, and leadership-rich learning environments. Students then transition to **Middle School** (Grades 7–8), where Montessori principles continue to guide academic rigor, social development, and preparation for future success.

Encompass will offer a stable K–8 continuum, minimizing disruptive school transitions often faced by students in conventional settings. Students will learn in multi-age Montessori classrooms organized into three-year developmental groupings: Lower Elementary, Upper Elementary, and Middle School. Students in Lower and Upper Elementary will remain with the same teacher and cohort for three-year cycles, allowing strong, trusting relationships to form and leadership skills to develop organically across age groups. Middle School students will work closely with their adolescent guides throughout their seventh and eighth grade years, further strengthening the continuity and depth of relationships across the critical years of early adolescence.

The Montessori approach is inherently personalized. Each student's learning plan will be tailored to their developmental stage, interests, and learning style, allowing for intrinsic motivation and deeper engagement. Students progress at their own pace through an interdisciplinary, hands-on curriculum that fosters critical thinking, creativity, and independence. Rather than being passive recipients of information, students actively construct their understanding of the world through exploration and discovery.

In addition to the rich Montessori curriculum, Encompass will provide comprehensive support to address the full range of students' needs. A dedicated social workers/counselor, a thoughtfully designed outdoor learning environment, and after-school programming will be integral to the student experience. These resources will promote social-emotional development, extend academic learning beyond the regular school day, and ensure that all students have access to enriching experiences that support their overall growth.



Our educational environment will intentionally reflect and affirm the diverse cultural, linguistic, and lived experiences of the community we serve. Hiring practices will prioritize recruiting teachers and staff whose backgrounds mirror those of our students. Ongoing professional development will focus on building strong, relationship-centered teaching practices rooted in empathy, cultural responsiveness, and respect for each child's individuality. These efforts will ensure that all students feel seen, valued, and understood, fostering a school climate where every child can reach their full potential.

Recognizing families as essential partners, Encompass will work actively to remove barriers to engagement. By hiring and supporting multilingual staff, cultivating partnerships with local organizations, and prioritizing local hiring whenever possible, the school will foster trust, communication, and shared ownership. These efforts will create a vibrant, inclusive school community that supports academic success, social-emotional growth, and community empowerment.

Through its comprehensive Montessori model, Encompass Montessori Charter School will offer an innovative, equitable, and nurturing educational environment—one where all children are guided toward academic excellence, personal growth, and a lifelong love of learning.

10.2. Goals for the Proposed Charter School

Q180. 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.



Encompass' students will demonstrate achievement or growth in Reading/ELA as measured by i-Ready, WIDA, ACCESS, or another benchmark reading assessment. The school leadership team will report to the Board on progress toward these targets after each benchmark testing session.

- Students in their first full academic year of enrollment (FYOE) will:
 - score at the median growth percentile of 40 or higher OR
 - 65% of students score at grade level OR
 - meet their growth targets
- Students in their second full academic year of enrollment (SYOE) will:
 - score at the median growth percentile of 45 or higher OR
 - 65% of students score at grade level OR
 - meet their growth targets
- Students in their third full academic year of enrollment (TYOE) will:
 - score at the median growth percentile of 50 or higher OR
 - 65% of students score at grade level OR
 - meet their growth targets

Encompass' students will demonstrate achievement or growth in mathematics as measured by i-Ready or another benchmark math assessment.

- Students in their first full academic year of enrollment (FYOE) will:
 - score at the median growth percentile of 40 or higher OR
 - 65% of students score at grade level OR
 - meet a growth percentile of at least 35
- Students in their second full academic year of enrollment (SYOE) will:
 - score at the median growth percentile of 45 or higher OR
 - 65% of students score at grade level OR
 - meet a growth percentile of at least 40
- Students in their third full academic year of enrollment (TYOE) will:
 - score at the median growth percentile of 50 or higher OR
 - 65% of students score at grade level OR
 - meet a growth percentile of at least 45



Goal 2, Student Social-Emotional Fluency: 80% of Encompass' students will demonstrate Executive Function skills by meeting or exceeding national developmental benchmarks using the Minnesota Executive Function Scale (MEFS) each academic year. Students will score at or above the 40th percentile or have improved during the school year. The school leader will share aggregate MEFS testing results after beginning and end of year assessment windows.

Goal 3, Montessori Teacher Certification of Staff: By year 5, 85% of Encompass' classrooms will be staffed by a state credentialed teacher with Montessori certification for the age/grade level at which they teach. The other 15% of staff will be licensed to teach in the state and currently enrolled in Montessori training en route to certification. The Executive Director will report this statistic to the board at the start of each academic year.

Goal 4, Student Enrollment: Encompass will meet the enrollment goals set forth in the ADM projections for the school's first five years. (AY 1: 144 , AY2: 240 , AY3: 336 , AY4: 432 , AY5: 528). Families will re-enroll at a rate of 85% per year with a target of 95% re-enrollment. The Board will receive monthly enrollment reports from the school leadership team.

Goal 5, Family Partnership: Encompass will foster and sustain authentic relationships through the creation of a representative community association with genuine opportunities for families to contribute, clear and regular communication with families and the provision of family engagement events at least four times an academic year.

Goal 6, Programmatic Fidelity: Encompass will score in the "Strong Implementation" category in all domains of the NCMPS Essential Elements Rubric. Those domains being: Adults, Montessori Learning Environment, Family Partnership, Leadership and Organizational Development, and Assessment.

Goal 7, School Finances: Encompass' resources will be managed effectively. The annual budget will be presented, implementation of the budget will be adequately monitored, policies around personnel and recommendations for management of finances will be created and enforced, and annual auditing will be appropriately attended to, supported and passed. The Board will steward the school's financial resources through Finance Committee meetings and regular budget updates during scheduled board meetings.



Goal 8, Operational Accountability: Encompass will maintain clear and consistent communication with the governing board and stakeholders about progress toward school goals. The Executive Director and Principal will provide monthly updates during scheduled board meetings, including data on academics, enrollment, staffing, finances, and overall program implementation.

The governing board will actively monitor school performance, ensure compliance, and engage in ongoing training and self-assessment to strengthen its effectiveness. The Executive Director will report on progress toward these goals at regular intervals during monthly Board meetings. Success will be measured by timely reporting, strong stakeholder engagement, and steady progress toward key operational benchmarks.

Q181. How will the governing board know that the proposed public charter school is working toward attaining their mission statement?

The governing board will monitor progress toward Encompass's mission through regularly scheduled meetings and detailed updates from the school's leadership team. These updates will include both high-level overviews and specific data on academics, operations, and student development.

Student performance will be tracked through formal assessments such as i-Ready and the Minnesota Executive Function Scale (MEFS), along with key indicators like attendance, test scores, and behavioral data. Broader outcomes—such as mastery, promotion, and suspension rates—will be reviewed three times per year, during the fall, winter, and spring terms.

Regular communication will be a shared responsibility between the board and leadership, supported by compliance and communication platforms as needed. In addition, results from the biannual Essential Elements Review will be provided annually to the board, offering insight into Encompass's implementation of key programmatic areas: adult capacity, learning environments, family partnership, leadership and organizational development, and assessment.



11. Educational Plan

11.1. Instructional Program

Q182. Provide a detailed description of the overall instructional program of the proposed charter school, including major instructional methods and assessment strategies, and explain how this program meets the needs of the targeted student population.



Major Instructional Methods

Encompass Montessori will use the Montessori education model, a well-established classroom based, whole-school model practiced around the world, including in approximately 3,000 independent schools and more than 500 public district, magnet, and charter programs in the US (The Montessori Census (<http://www.montessoricensus.org/>)). Approximately 200,000 students in the U.S. attend a public Montessori program, with about equal representation between white students/ students of color and FRL/paid lunch. Montessori education was originally developed more than 100 years ago and initially designed and implemented to serve high-needs, low socioeconomic populations. Today it has spread to 16,000 schools around the world, serving more than a million children. Students in Montessori classrooms experience deep engagement, academic achievement, and love of learning. The Montessori experience creates an environment where 21st century skills are woven into the culture and curriculum, and students become proficient in adaptability, teamwork, communication, and problem-solving.

References:

- Lillard, A. et al. 2021. An Association Between Montessori Education in Childhood and Adult Wellbeing (<https://www.ncbi.nlm.nih.gov/pmc/articles/PMC8656358>)
- Randolph, J. et al. 2023. Montessori Education's Impact on Academic and Nonacademic Outcomes: A Systematic Review (<https://onlinelibrary.wiley.com/doi/10.1002/cl2.1330>)
- Austin Children's Academy. n.d. Montessori & Its Impact On 21st Century Learning (<https://austinchildrensacademy.org/blog/montessori-learning-impact-on-modern-world/>)

In U.S. public schools, Montessori has been shown to support academic achievement, literacy, and executive function, and to reduce gaps across demographics. Selected studies:

- Lillard, A. et al. 2017. Montessori Preschool Elevates and Equalizes Child Outcomes: A Longitudinal Study (<https://www.frontiersin.org/articles/10.3389/fpsyg.2017.01783/full>)
- Culclasure, B. et al. 2018. An Evaluation of Montessori Education in South Carolina's Public Schools (<https://www.furman.edu/wp-content/uploads/sites/195/rileypdfFiles/%20MontessoriOverallResultsFINAL.pdf>)



- Snyder, A., Tong, X., & Lillard, A. 2022. Standardized Test Proficiency in Public Montessori Schools
(<https://www.tandfonline.com/doi/full/10.1080/15582159.2021.1958058>)

Encompass Montessori will offer a program that fully implements the Montessori method, integrating cultural and social norms in the community, which will ensure the greatest outcomes for Wake County students.

Montessori achieves this success through a comprehensive, cohesive, and coherent model of education and human development. The model takes into account changes in children's development across age ranges, and implements key strategies appropriately for each age. Montessori education is characterized by eight important elements working together. (NCMPS. 2023. Essential Elements for Public Montessori (<https://drive.google.com/file/d/1kL4oyw0IR2lBj43hOMBEQjJWd56OFbse/view>))

1. Comprehensive age-appropriate curriculum
2. Hands-on, concrete materials
3. Prepared Teachers
4. Multi-age/looped classrooms, facilitating differentiated instruction and collaborative learning
5. Agency and choice
6. Independent activity over long work periods
7. Individual, small, and large group lessons
8. Interdisciplinary learning

1. Comprehensive age-appropriate curriculum

The Montessori curriculum introduces concepts and skills at a level and in a manner appropriate to the age and developmental level of the child. This means more fundamental concepts and concrete, hands-on experiences for preschool children, more abstract concepts and social learning for grade school students, and expanded horizons for young adolescents in middle school. The traditional Montessori curriculum used world-wide has been aligned to U.S. national and state standards by NCMPS (NCMPS, 2022, Montessori Curriculum to Standards Alignment (<https://www.public-montessori.org/the-montessori-curriculum-to-standards-alignment-mcsa/>)), and NCMPS has worked with states to create state-level alignments. Encompass will implement a Montessori curriculum aligned to the North Carolina Standard Course of



Study, utilizing resources such as the NCMPS Montessori Curriculum to Standards Alignment (MCSA) and collaborating with other North Carolina public Montessori programs.

Kindergarten

At the Kindergarten level, instruction is grounded in foundational literacy, numeracy, and sensorial development, ensuring students build the skills necessary for long-term academic success. Children in preschool and kindergarten acquire fundamental concepts and skills through modeling, direct instruction, and independent exploration with engaging, attractive, scientifically designed manipulative materials. (Encompass will implement this curriculum at the Kindergarten level.) Curriculum includes:

- Science of Reading-aligned materials and activities for phonemic awareness, decoding, word recognition, language comprehension, and reading comprehension.
- Writing work that covers both the development of the hand and composition on a range of topics.
- Mathematics including whole number counting through operations with multi-digit numbers and exploration of fractions and graphing.
- Sensorial activities introducing geometric shapes and solids, measurement, geography, music, art, and more.
- Fundamental science and cultural concepts at an age-appropriate level.
- Functional independence in practical and social situations.

1st- 6th Grade

Grade-school aged children build on the concepts and skills developed in kindergarten and engage in higher levels of abstraction. The curriculum includes:

- Reading support, reading and writing extension, and literature study.
- Standards-aligned mathematics with sufficient depth to engage students at all levels.
- Hands-on, collaborative physical, earth, and life science.
- Integrated social studies preparing students to understand their own and others' cultures.
- Music, art, and physical education.

7th and 8th Grade



Middle school students continue to build on concepts and skills developed in earlier years, and take on academic work appropriate to their emerging roles as young adults in society. In addition to conventional subjects such as language, mathematics, science, and social studies, Montessori middle school students take part in real-world experiences and have an increasing role in managing community norms and procedures. In middle-school, project-based learning takes a strong role in the execution of the model, providing students with more voice and choice in their cross-curricular projects. In preparation for high school, middle schoolers are provided with increasing levels of autonomy and responsibility to ensure they are prepared to enter any local high school and thrive. A focus on self-direction and intrinsic motivation in the middle school years supports their growth as successful high school students. All middle school learning experiences are aligned to the North Carolina Standard Course of Study to ensure students are prepared for high school coursework and state assessments.

2. Hands-on, concrete materials

The Montessori curriculum is delivered using unique manipulative materials designed to engage students' interest and support independent exploration and learning. These materials are carefully designed to be aesthetically pleasing (to both sight and touch), self-correcting (so students need not constantly check for teacher's approval), and open-ended (engaging students in deep learning and mastery). Materials are typically presented to children by the teacher one-on-one or in small groups. The materials engage children's interest, so that they choose and continue to work with them, building skills and knowledge independently. This independence allows teachers to allocate their direct instructional time more efficiently, working with individual children or small groups sequentially, and circling back among children who are working to support exploration and check for understanding. Montessori uses a wide range of materials across all subjects. Some examples are given below for various grade levels. These are samples and not an exhaustive list.

Kindergarten

- Language: Sandpaper letters, moveable alphabet, 3-part cards and more support students' learning phonemic awareness, letter recognition, letter-sound correspondence, word formation, vocabulary development, self-expression, etc.



- Mathematics: Materials for number recognition and ordering, counting, place value, arithmetic operations, fractions, and more support the development of each child's mathematical mind.
- Sensorial exploration: Materials for color, dimension, measurement, geometric shapes and solids, texture and more support students' acquisition of language and provide mental frameworks for ordering and organizing their experiences and the world around them.
- Cultural studies: Materials for geography, science experiments, cultural explorations, and more spark students' interest in the natural world, answer simple questions about how things work, and build their sense of connections within their community and to the larger human family.

1st- 6th Grade

- Language: Sentence Analysis charts and Grammar Boxes for learning the functions of the parts of speech provide newly fluent readers with tools for greater reading comprehension and strengthening their writing.
- Mathematics: Materials for two-place multiplication, division of fractions, squaring, cubing, square and cube roots, and non-decimal bases extend the learning from early childhood and lay the foundations for higher level mathematics.
- History and science: Charts and timelines for geological history, botany and zoology,, and human history make abstract concepts visible and support children's acquisition of increasingly more complex knowledge.

7th and 8th Grade

The middle school program is delivered in two ways: through subject-specific, in-depth learning that progresses sequentially and through interdisciplinary project based learning that builds off of subject-area learning and student interest. For middle school students, hand-on learning and concrete materials can mean getting involved in solving real life problems, from identification through to solution and ongoing implementation. Whether raising money, writing letters, working with younger students, building recess activities, or facilitating dialogue, for middle school students the world and all it offers becomes the concrete materials and students are fully ready to engage.

Selected references:

- Lillard, A. 2017. Montessori: The Science Behind the Genius (https://www.montessori-science.org/%20montessori_science_genius.htm)



- Chapter 2: The Impact of Movement on Learning and Cognition
- Chapter 5: Interest in Human Learning

3. Prepared Teachers

Montessori teacher preparation entails mastery of the full curriculum and materials, including lesson planning, delivery, observation, progress monitoring, and assessment. This deep preparation allows teachers to follow each child's individual trajectory of learning, offering one-on-one or small-group lessons at the precise moment they are most impactful.

Encompass will prioritize hiring appropriately prepared Montessori teachers and will implement a comprehensive onboarding and coaching model to support fidelity of practice. Where fully prepared teachers are not available, Encompass will partner with established Montessori teacher preparation programs to support teacher development. Concurrently, Encompass plans to develop an in-house teacher residency and mentoring model to build internal capacity over time. This phased approach ensures both immediate staffing needs are met and a sustainable, long-term pipeline of well-prepared Montessori educators.

4. Multi-age/looped classrooms, facilitating differentiated instruction and collaborative learning

Montessori education uses mixed-age, "looped" classrooms aligned to children's developmental stages, where children stay in the same classroom with the same teacher for two or three years at a time. The groupings are:

- PK3-K (Encompass will offer a single-grade K classroom)
 - 1st-3rd grade
 - 4th-6th grade
 - 7th-8th grade

Looped classrooms have been shown to confer large benefits on children.

- Children are with a teacher for longer, allowing for better rapport and understanding, which are essential for learning.



- Only one-third of the class is new every year, allowing for stronger and deeper classroom culture and increased independence as the older students orient younger to materials and expectations.
- Each classroom contains a full multi-year cycle of materials and curricula, allowing students to seamlessly advance as far as they are able.
- Mixed ages allow for peer teaching and learning.
- Montessori teacher preparation and curriculum anticipate mixed-age groups and allow for effective differentiation across skill levels.

References:

- Wedenoja, L. 2019. Teacher Looping Improves Student Outcomes (<https://rockinst.org/blog/%20teacher-looping-improves-student-outcomes/%20#:~:text=Effects%20of%20Looping,scores%20in%20the%20prior%20year>)
- Lillard, A. 2017. Montessori: The Science Behind the Genius (https://www.montessori-science.org/%20montessori_science_genius.htm)
 - Chapter 7: Learning from Peers.

5. Agency and choice

Children in Montessori classrooms have a significant degree of choice on what to work on, when, and with whom, within a carefully constructed and constrained set of options. Montessori teachers are trained to prepare the environment, deliver engaging lessons, and scaffold student choice and achievement. Abundant research links free choice within an ordered structure to better psychological and learning outcomes. In particular, choice among limited options supports cognitive flexibility and inhibitory control, which are key elements of executive function.

References:

- Lillard, A. 2017. Montessori: The Science Behind the Genius (https://www.montessori-science.org/%20montessori_science_genius.htm)
 - Chapter 3: Choice and Perceived Control.

6. Independent activity over long work periods



All of these elements—a holistic, developmental approach; comprehensive, standards-aligned curriculum; specialized materials; looped classrooms; and student choice—come together in extended work periods in the Montessori classroom. Students enter the classroom daily prepared to choose and work independently with lessons, materials, and activities they have been previously exposed to. Teachers introduce new lessons that a student is ready for exactly when that student is ready for it based on extensive observation and record-keeping. Students have long periods of time (typically two to three hours) to engage deeply and move from one activity to another on a schedule dictated by their own levels of interest and ability, rather than an externally imposed timeline which is inevitably either too slow or too fast for students on either end of the learning progression. Teachers can focus on individual students or small groups, giving each child the direct attention needed to support their personal and academic development while the rest of the class functions independently. A classroom assistant supports independence and problem-solving with students leaving the teacher free to teach.

7. Individual, small, and large group lessons

Montessori instruction is typically delivered to individual children (in Kindergarten) or small groups (Kindergarten and above), occasionally to larger groups, and only rarely to the whole class. The mixed-age, independence-focused structure of the classroom supports this model. This allows for individual instruction, differentiation, and higher levels of teacher attention to children's strengths, abilities, and areas of growth.

8. Interdisciplinary learning

Beginning in the early years and developing into the elementary years and beyond, the Montessori curriculum is comprehensive and interdisciplinary. Young children might match colors and sizes they are exploring with concrete materials to objects in the environment, or use their counting skills in practical activities such as counting glasses while setting up or lunch. In the elementary years, physics, geography, biology, history, language, mathematics, and more are woven into a coherent whole where the interdependencies across disciplines are emphasized. And, in middle school, thematic integrated studies foster the development and application of cross-curricular skills.



Assessment Strategies

Encompass will use a balanced assessment system that includes state-required assessments, standardized benchmark tools, and Montessori-aligned formative assessments to monitor student progress and inform instruction. Assessment is crucial for two reasons: 1) to assess the success and performance of a school's program in general and 2) to be able to effectively target instruction to individual student needs. In order to meet both of these needs, Encompass will use a combination of assessments that include both those required and recommended by the North Carolina Department of Public Instruction and best Montessori practice.

In accordance with the North Carolina Department of Public Instruction, our curriculum and teaching will prepare students for the Grade 3 Read to Achieve and End of Grade (EOG) exams. The content and skills tested will be integrated throughout the already robust curriculum and our daily, weekly, and monthly assessments of the students will ensure they are on-track to perform on, or above, grade level. In grades K - 2, Encompass will use the i-Ready Diagnostic Assessment program as a formative benchmark measurement. We will use the state-recommended WIDA Screener and ACCESS assessments to identify and support our multilingual learners and NCEXTEND1 Alternate assessments as appropriate for students whose disabilities qualify them for its use.

Montessori uses a mastery-based assessment system for students' progression through the learning materials. Within an individualized mastery-based system such as Montessori, formative assessment and careful tracking of each student's progress is crucial. Teachers are prepared to carefully observe and assess student progress through lessons—tracking when students are introduced to, practicing, approaching, and, finally, achieving mastery of a lesson.

Encompass will use an online record-keeping tool such as Transparent Classroom to track individual student progress through these phases of learning for each lesson. Within Transparent Classroom, teachers will access the Encompass lesson set (curriculum) that reflects the NC Standard Course of Study. Teachers will use individual student-level observation tools that are housed within Transparent Classroom for deep, qualitative assessment and tracking of student progress. Reports for parents will be generated directly from the data recorded through Transparent Classroom.



Executive Function (EF) is crucial to school and life success and support of EF development is integrated into every aspect of the Montessori environment. Encompass will use the Minnesota Executive Function Scale (MEFS) from Reflection Sciences for individual student-level assessment of EF starting in Kindergarten to measure EF growth over the course of the academic year. MEFS is a nationally recognized and normed assessment tool based for assessing Executive Function.

Meeting the Needs of the Targeted Population

Encompass Montessori's student population will include the full range of backgrounds and abilities of students in its community in eastern Wake County. Because Montessori meets each child where they are and leverages their individual abilities and interests to provide them with access to the full content of the curriculum, the program is uniquely suited for a broad range of contexts.

- Individually-paced—the design of the classroom, materials, and teacher education, makes possible a classroom where the curriculum truly meets the child where they are and moves forward with them, guided by their teacher and at their rate of learning.
- Structure—although students experience a high degree of autonomy within the classroom in terms of what they choose to work on and for how long in a given day, the continuum of learning within the curriculum is clearly defined. At each level, students demonstrate mastery of essential skills before progressing to the next, with instruction intentionally aligned to state standards, ensuring that student mastery within the Montessori sequence also meets all required grade-level competencies.
- Fundamentals—Montessori uses concrete, hands-on materials and projects to scaffold learning starting with the basics and continuing through more complex ideas. The Montessori materials meet children's needs by beginning concrete while students need that and moving to abstraction as students are ready.
- Relevance and Rigor—teachers have the leeway and expectation to meet students interests and find work that is relevant to students. This increases engagement and supports students in maintaining the concentration and interest that supports ever-increasing levels of challenge and rigor. Research shows that Montessori is especially effective when compared with other curricula with children from lower-income families and Black and Hispanic children, which make up the majority of families in eastern Wake County.



These elements ensure that all students (regardless of background or starting point) are able to access rigorous content, make continuous academic progress, and meet or exceed grade-level expectations.

References:

- Lillard, A. et al. 2017. Montessori Preschool Elevates and Equalizes Child Outcomes: A Longitudinal Study (<https://www.frontiersin.org/articles/10.3389/fpsyg.2017.01783/full>)
- Culclasure, B. et al. 2018. An Evaluation of Montessori Education in South Carolina's Public Schools (<https://www.furman.edu/wp-content/uploads/sites/195/rileypdfFiles/MontessoriOverallResultsFINAL.pdf>)
- Snyder, A., Tong, X., & Lillard, A. 2022. Standardized Test Proficiency in Public Montessori Schools (<https://www.tandfonline.com/doi/full/10.1080/15582159.2021.1958058>)

Q183. Will the proposed charter school serve a single-sex student population?

- ☐ Yes
- ☒ No

Q187. What is your school's educational philosophy and how does it translate into your daily classroom practices and curriculum design?



Encompass Montessori Charter School is grounded in the Montessori philosophy, a child-centered, developmentally responsive approach to education that emphasizes independence, inquiry, and the education of the whole child. This philosophy prioritizes hands-on learning, mixed-age collaboration, and real-world application of knowledge, supporting students' academic, social, and emotional growth. This philosophy directly translates into daily classroom practices through the structure of the prepared environment, uninterrupted work cycles, and individualized instruction, and informs curriculum design through alignment with developmental needs and academic standards.

Encompass Montessori will offer a classroom-based learning environment. Students will also use outdoor environments for learning extension activities (biology, physical science, measurement, etc.). We will engage with the local community to identify enrichment activities for the students in all grades to expose them to additional experiences and potential passions or careers, providing additional hands-on opportunities to deepen their learning and to reinforce their role as valuable community members by participating in and giving back to their neighborhood.

Montessori schools use three-year mixed-age "looped" classrooms, which allow students, teachers, and families to form a strong bond over the course of multiple years. This bond supports each student's continuous and seamless learning with minimal disruption between years and contributes to close collaboration between the families and the teachers. These Montessori three-year cycles are well-established and designed around the developmental needs of children, grouping children who have similar social, emotional, and academic characteristics together. Given that Encompass Montessori will begin at Kindergarten instead of with Montessori's traditional preschool/pre-kindergarten age, the school will maintain a single grade classroom for Kindergartners, allowing for a structure that supports the developmental needs of early childhood. Elementary and Middle School classrooms will be multi-age. Encompass Montessori's classroom grade bands and student populations will be:

- - K: Classrooms of 24
 - 1st–3rd grade: Classrooms of 24
 - 4th–6th grade: Classrooms of 24
 - 7th–8th grade: Classrooms of 24



The classroom environment is a key element of strong Montessori implementation, and each classroom will be carefully prepared according to Montessori design principles. For Kindergarten and Elementary, this includes a full complement of curricular materials, open shelving, and multiple work areas. At all levels, the classroom environment is prepared with natural materials and colors, in an orderly and calming fashion. Classroom artwork is carefully curated and plants, rugs, and lamps create a warm and welcoming environment. All of this together creates a calm environment that supports students' focus and learning.

Approaches to Learning:

At Encompass Montessori Charter School, the Kindergarten and Elementary (Grades 1–6) programs are built around the cornerstone of Montessori education: the **uninterrupted work cycle**. These extended blocks of independent and guided work time provide children with the opportunity to develop concentration, independence, perseverance, and a true love of learning. By respecting children's natural rhythms and interests, the work cycle ensures deep engagement and nurtures the foundational skills necessary for future academic and personal success. This structure is a direct expression of Montessori philosophy in daily practice and serves as the primary vehicle through which the curriculum is delivered.

In Kindergarten, the **uninterrupted work cycle** typically spans three hours, beginning after a brief arrival transition. During this period, children freely choose lessons across Practical Life, Sensorial, Language, Math, and Cultural Studies. Teachers observe carefully, present new lessons individually or in small groups, and prepare the environment to meet the evolving needs of each child. Movement is purposeful, collaboration emerges naturally, and children learn to manage their time and workspace independently. This long, uninterrupted time fosters a sense of accomplishment and intrinsic motivation critical during the formative years.

In the Elementary program, the **uninterrupted work cycle** continues to be a protected period of approximately three hours but evolves to meet the needs of the second plane of development. Elementary students engage in **independent work, collaborative work, and small-group lessons** in mathematics, language, geometry, history, and sciences. Collaboration and exploration are hallmarks of this stage, as students' imaginations and reasoning abilities flourish. Elementary guides serve as facilitators, introducing "Great Lessons" and offering key lessons throughout the curriculum to



inspire independent inquiry and interdisciplinary connections. A shorter **afternoon work cycle** follows lunch and recess, offering time for follow-up work, extended research, art, music, and physical education enrichment.

Throughout both Kindergarten and Elementary levels, the uninterrupted work cycle at Encompass Montessori fosters not only academic mastery but also the development of vital executive functioning skills such as time management, decision-making, and perseverance. By protecting the child's natural capacity to focus and explore, we honor each learner's journey and lay the foundation for a lifetime of curiosity and purposeful work.

The Adolescent Program at Encompass Montessori Charter School offers a dynamic, academically rigorous learning environment that honors the Montessori vision for the third plane of development. Each day begins with **morning meeting** and a period of **independent work**, providing students with time to transition smoothly into the academic day by engaging in ongoing projects, research, or independent study. Once a week, students gather for the **Colloquium**, a structured academic assembly that will become a hallmark of the adolescent experience at Encompass. The Colloquium offers opportunities for guest lectures, student-led presentations, Socratic discussions, and interdisciplinary project launches, helping students develop critical thinking, communication skills, and intellectual leadership within a collaborative community of learners.

The heart of the adolescent schedule is the **interdisciplinary learning blocks**, where students engage in cycles of academic lessons and occupation-based work that connect English Language Arts, Social Studies, Science, and Mathematics in meaningful ways. Students are guided by two specialized teachers: a **Humanities teacher** (covering English Language Arts and Social Studies) and a **STEM teacher** (covering Mathematics and Science). These interdisciplinary blocks foster deep inquiry, real-world application of knowledge, and collaborative learning, preparing students for both academic success and purposeful work beyond the classroom.

On designated days, students participate in **elective cycles**, opportunities for electives developed by both teachers and students. Courses in visual arts, drama, sports, studio art, foreign language, and personal passions are offered during these periods, allowing students to cultivate creativity, individuality, and physical expression. One afternoon per week concludes with **community meeting** sessions focused on social-emotional development and leadership, and the other four days include a daily period of **advisory**



to strengthen executive functioning. As enrollment grows, the adolescent program is organized into collaborative learning communities of approximately 49 students supported by two specialist teachers, ensuring a small, personalized educational environment within a thriving Montessori public charter model.

At Encompass Montessori Charter School, the adolescent program will incorporate **occupations** and **micro-economy** as essential components of Montessori education for young adults. Occupations are purposeful, community-centered work projects, such as managing gardens, publishing a literary journal, or maintaining a small business, that allow students to apply academic knowledge in meaningful, real-world contexts. Through micro-economy, students develop entrepreneurial skills, financial literacy, and a deeper understanding of interdependence by managing small-scale enterprises that serve their learning community. The specific occupations and micro-economy initiatives will be thoughtfully developed in collaboration with the founding staff and the students themselves, ensuring that the work reflects both Montessori principles and the unique interests, talents, and needs of the adolescent community.

References

- Lillard, A. et al. 2017. Montessori Preschool Elevates and Equalizes Child Outcomes: A Longitudinal Study
(<https://www.frontiersin.org/articles/10.3389/fpsyg.2017.01783/full>)

Curriculum Design and Standards Alignment:

Encompass Montessori's curriculum is intentionally designed to align Montessori materials and instructional approaches with the North Carolina Standard Course of Study. While students engage in individualized, hands-on learning through Montessori materials, lessons are purposefully mapped to state standards to ensure that all required academic competencies are met. The curriculum is interdisciplinary in nature, particularly at the Elementary and Adolescent levels, allowing students to make meaningful connections across subject areas. Teachers use ongoing observation, formative assessment, and student work to guide instruction and ensure progression through both Montessori scope and sequence and state standards. This alignment ensures that students are fully prepared for state assessments while maintaining the integrity and effectiveness of the Montessori model.

Research supports the effectiveness of this approach. Studies (Lillard et al., 2017; Snyder, Tong, & Lillard, 2022) demonstrate that Montessori students often show strong academic outcomes, including higher proficiency in English Language Arts and



comparable or stronger performance in mathematics, with smaller achievement gaps among demographic subgroups.

The North Carolina Accountability Model grades schools according to achievement (80%) and improvement (20%). Montessori's record of supporting achievement will enable Encompass Montessori to meet achievement goals. Encompass will break out achievement data by demographic subgroups as specified in the model and expects to do well with these groups based on the research cited above. Encompass students are expected to achieve at a Level 3 or above on NC's end-of-grade tests beginning in Grade 3.

Encompass will follow the testing requirements of the NC Accountability Model and use the results for deep data study and understanding of where individual students or groups as a whole need additional support, time, and/or approaches. This data and learning will inform classroom instruction so that all students learn, progress, and achieve.

References

Snyder, A., Tong, X., & Lillard, A. 2022. Standardized Test Proficiency in Public Montessori Schools (<https://www.tandfonline.com/doi/full/10.1080/15582159.2021.1958058>)

Q188. Describe a typical day for students at different grade levels in your school, including how core subjects are integrated and what instructional methods teachers will primarily use.



Encompass Montessori will operate with a conventional five day school week and hours of instruction. The school day for all students will be 8:30am - 3pm. The school day for teachers will be 8am - 4pm. One day/week there will be a full faculty meeting that extends to 5pm. In addition to classroom and lesson preparation, this after school time for teachers will be used for team meetings, parent meetings, coaching, etc. Between 8:30am - 3pm, students will spend approximately 5.5 hours as instructional minutes and approximately 1 hour for lunch and gross motor/outdoor activities. Montessori makes use of long open work periods during which students may have several direct lessons (small group or 1:1) with their teacher as well as ample time to choose their own work and follow up on previous lessons.

Accordingly, the schedule for Kindergarten and Elementary will be as follows: 8:00 - 8:30 Teachers are on-site and in their classrooms preparing for the day. This time may also be used for meeting with parents and/or conferencing between the lead teacher and classroom assistant as to the plan for the day and any special needs they have noticed for the class or individual students.

8:30 Arrival and greetings. Students come in and get right to work where they left off the day before. Students may also help themselves to breakfast in the classroom. All students should be in their classroom and productively engaged by 8:30. 8:30–11:30 Morning Work cycle. Teachers give lessons while students attend or pursue work of their own choosing. Teachers circulate, check in, and support during this time. During this time, some students will prepare snack and students may partake in turns throughout the morning.

11:30 - 12:00 Whole-class meeting for community time and announcements, read-alouds, songs, discussions that call on critical thinking skills, etc.

12:00 –1:00 Lunch and Gross motor time (Outdoor play, weather permitting, or gym) allowing for 30 minutes or more of physical activity for all students

1:00 – 3:00 Afternoon work cycle. Teachers give lessons while students attend or pursue work of their own choosing. Teachers circulate, check in, and support during this time as well. At the end of the work cycle, students will tidy the classroom and participate in an orderly dismissal. In middle school, the schedule is modified to fit the developmental needs of the adolescent, providing greater opportunity for integrated studies and self-expression.



Within the morning and afternoon extended work periods, teachers are responsible for tracking student work and ensuring that each student spends a minimum of 2 hours/day on ELA and math, with science and social studies woven throughout as interdisciplinary studies. Student work journals and teacher record-keeping is of utmost importance in ensuring student progress across all subject areas and teachers guide students to work they may be avoiding or areas in which they need to focus their energies. Instruction in co-curricular areas including visual arts, performing arts, and physical education will be incorporated into the day.

During year five, Encompass plans to begin hiring specialist teachers to provide small group, focused work and activities for students for grades 1-6. Grades 1-6 will work with a specialist teacher in each of these areas either by age-group or interest (choosing, eg, if they want to attend a PE class for relay races or cooperative games) and students will stay at each area for a minimum of a 30 minute period of focused work or activity.

In middle school, students will participate in self-expressions: cycles of student and teacher-developed electives (e.g. visual arts, sports, drama, foreign language, special interests, etc.) while also having access to the art, music, and PE teachers' expertise. Teachers will track students' attendance at co-curricular offerings to ensure that every student attends at least 1 visual art, performing art, and PE session per week so that all students are exposed to all areas. This schedule and approach to learning, with large periods of uninterrupted time during which students are guided by teachers and allowed to focus for extended periods is the hallmark of Montessori education and conducive to the deep learning, engagement, and executive function outcomes research and experience show come from a strong Montessori program.

Q189. How will your curriculum address the diverse learning needs and academic levels of students, and what systems will you have in place to monitor and adjust instruction based on student progress?



Encompass Montessori will function in full accord with federal (IDEA), state, and local laws and regulations with regard to children with special needs. We are committed to providing an inclusive learning community where every child develops his/her full potential and individual differences are respected and embraced.

With the support of tools and resources available from the National Center for Montessori in the Public Sector, Encompass Montessori will deliver a standards-aligned Montessori curriculum. This curriculum provides a scope and sequence for all academic content as well as guidance regarding when children can be expected to master certain skills and knowledge. Specifically, two tools, the Montessori Curriculum to Standards Alignment (MCSA) and the Transition Skills Inventory, provide this guidance for teachers. The MCSA supports standards-based instruction in multi-grade classrooms, detailing which content can broadly be expected to be mastered in either K, the early years of elementary (1st/2nd grade), the middle years of elementary (3rd/4th grade), or late elementary (5th/6th grade). Students may move more quickly through lessons in some curricular areas and more slowly in others, but teachers are expected to identify and respond when a student is not progressing at the expected pace. Additionally, the Transition Skills Inventories mark the important learning that should take place before children move between levels: Kindergarten to Lower Elementary, Lower Elementary to Upper Elementary, and Upper Elementary to Middle School. This alignment ensures that all students are progressing toward mastery of the North Carolina Standard Course of Study, even within a multi-age, individualized learning environment.

Teachers will engage in ongoing Lesson Study, collaborative planning in grade-level teams, and will receive support from instructional coaching in order to ensure they are delivering the wide range of lessons children need to grow and progress. Record keeping in Transparent Classroom provides the daily and weekly data and documentation teachers and staff will use to ensure that all children are making progress towards their learning goals. Teachers will analyze the progress of large and small groups as well as individuals, and ensure that weekly planning and instruction offers an enriched experience for all learners, paying close attention to children who are not progressing at expected rates. This analysis directly informs instructional decisions, including re-teaching concepts, adjusting the level of materials, increasing the frequency of lessons, or introducing targeted interventions based on individual student needs.



Encompass will utilize NCMPS Screeners for Early Childhood (Normalization Check) and Elementary (Adjustment Check). These will be used after the first six weeks of school to help identify areas where each child may need additional support to be successful in the environment, to support communication with the child's family, and, if necessary, to inform the Child Study process described below. Mid-year entrants will be screened following a 4-6 week adjustment period.

Students working below grade level

Montessori teachers are constantly "studying" their students through multiple lenses, including cognitive and social developmental milestones, wide-scope developmental outcomes, the Montessori scope and sequence, and progress towards year-end expectations. Teachers design and adapt their lessons and key experiences to meet the skills and capabilities of the children before them. This scientific orientation embraces the whole child: their strengths, internal and external barriers to healthy development, as well as challenges and opportunities for growth. It explores the child's lived experiences, relationships with family and friends, past school environments, and special areas of interest.

This individualized attention is designed to help all children reach their fullest potential at their own unique pace, including those considered to be working "below grade level." Students who demonstrate advanced mastery will be provided with enriched and accelerated learning opportunities, including opportunities for deeper exploration, extended projects, and accelerated progression through the curriculum. Using the tiered instruction approach discussed below, kindergarten, elementary, and middle school students will receive the individual support and, if needed, IEP accommodations and services they require to successfully complete the Montessori program and progress to the next academic level.

Encompass will implement NCMPS Child Study, a Montessori-aligned RTI/MTSS system used widely in the public Montessori community, to support children who are performing below expected levels. The Child Study process, which combines careful observation, interventions, and tracking of progress, is outlined below and in the attached documents. Child Study is what happens before a child is considered for



identification for Special Education in those cases where it is appropriate. This process aligns with the school's broader MTSS framework and connects directly to special education referral, evaluation, and service delivery processes described in Section 11.

Tier I: Universal Support- The Montessori Program and Curriculum

Tier I entails support for all learners in the classroom. In fact, even before classroom interactions begin, Tier I instruction begins by building effective, supportive relationships with families through school events, meetings with families, and written questionnaires.

Classroom teachers implement Montessori pedagogy and curriculum for all children. Montessori pedagogy is a differentiated approach to education so this level of personalization is true for all children in a classroom using Montessori as the Tier 1 curriculum. Just like RTI and MTSS, Child Study relies on data collected using screening tools, observations, and assessments as it moves through three tiers of scaffolded support. Teachers identify and track each individual child's progress, including both strengths and needs, and offer differentiated instruction within individual and small group lessons. Teachers observe children's interactions with learning materials and their progress through the curriculum, adapting and supporting as needed. Teachers keep detailed records of lessons given and children's work as children progress from being introduced to a material or skill, to practicing it, approaching mastery, and then mastery. Teachers analyze this tracking data for all students, looking for emerging patterns. Teachers and the Montessori instructional coach meet to discuss student data, classroom practice, and the learning environment.

Additional support with the usual classroom materials and learning is part-and-parcel of Tier 1 instruction in Montessori. If progression data shows a child needing additional support, teachers complete a Child Summary Form (attached) that details health, family, and services information; assessment data; observations; strengths; and challenges. Teachers indicate possible unmet needs, lagging skills, and obstacles.

Working with the school's Child Study Lead and also possibly with peer teachers at the same level, teachers will develop an Action Plan for each child using Universal support. The Action Plan includes interventions to be implemented, SMART goals, a schedule for implementation and data gathering, and anticipated outcomes. The Action Plan is finalized with families during the Family Meeting. Teachers implement interventions,



gather data, and track outcomes, and hold an Outcomes Meeting with the family to share progress at the 6 - 8 week point. If additional Universal supports are appropriate, a new Action Plan can be developed and the process can repeat. This cyclical process of planning, implementing, monitoring, and adjusting instruction ensures that student progress is continuously evaluated and instructional approaches are refined in a timely manner.

When students are not progressing as expected, teachers adjust instruction within the core classroom by modifying lesson delivery, providing additional practice opportunities, or offering more individualized support before moving to more intensive interventions.

Tier II: Targeted Support

Children who show the need for more than Universal support in order to meet learning goals, will progress to Tier II on the Child Study progression. Tier II interventions are done in small groups or one-on-one, and the intervention frequency is at least 3x/week. Tier II interventions are designed to complement, not replace, Montessori instruction in the core. Ideally these interventions, whether delivered by the lead teacher or another staff person, will be embedded seamlessly within the Montessori work cycle. Observation and data gathering continue, and outcomes and recommendations are again formally discussed with the family on a 4 - 6 week schedule, however regular communication with families continues during this phase of intervention.

Sample Montessori Tier II Interventions for Individuals or Small Groups

Category	Area of Support	Tier II Intervention
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Academic	Literacy	Small-group phonics lessons using Montessori materials (e.g., moveable alphabet)
Academic	Literacy	Guided reading sessions focused on fluency and comprehension
Academic	Literacy	Targeted writing mini-lessons on sentence structure, punctuation, or genre
Academic	Literacy	Reading comprehension strategy groups with leveled Montessori readers
Academic	Literacy	Word study or spelling pattern practice using hands-on materials
Academic	Math	Pre-teaching or re-teaching lessons using concrete Montessori math materials (e.g., golden beads)
Academic	Math	Problem-solving groups using Montessori strategies
Academic	Math	Math fact fluency games integrated with Montessori tools (e.g., stamp game)



Academic	Math	Sequential skill-building with scaffolded concrete-to-abstract lessons
Academic	Cultural	Use three-part cards for repeated matching and naming practice
Academic	Cultural	Incorporate story-based recall (e.g., retelling a cultural story or timeline of events)
Academic	Cultural	Use memory journaling or drawing to reflect on key facts after a lesson
Behavior & SEL	Emotional Regulation	Check-in/check-out system with a trusted adult (e.g., Morning Connection)
Behavior & SEL	Emotional Regulation	Peace table modeling and guided reflection sessions
Behavior & SEL	Emotional Regulation	Mindfulness exercises during the work cycle (e.g., breathing cards)
Behavior & SEL	Emotional Regulation	Feelings journal or drawing with daily check-ins



Behavior & SEL	Social Skills	Small-group social skills circles (e.g., turn-taking, empathy)
Behavior & SEL	Social Skills	Role-playing scenarios based on classroom situations
Behavior & SEL	Social Skills	Grace and Courtesy re-lessons for specific routines
Behavior & SEL	Social Skills	Mentorship or buddy programs within multi-age classrooms
Executive Function	Organization & Focus	Individual work plans/checklists with visual icons
Executive Function	Organization & Focus	Timer or visual schedule supports for task transitions
Executive Function	Organization & Focus	Designated 'focus work zone' with minimal distractions
Executive Function	Organization & Focus	Daily work conference to review and plan tasks



Executive Function	Time Management	Breaking work plans into manageable tasks
Executive Function	Time Management	Goal-setting conferences emphasizing intrinsic motivation
Executive Function	Time Management	Self-monitoring tools (e.g., reflection strips, self-assessment cards)

Tier III: Intensive Support

Children reach this Tier when high-frequency, focused interventions with family coordination have not been successful in helping the child meet learning goals. Children at this Tier may be referred for Special Education evaluation. The observations, data, and family meeting notes from the previous Tiers form part of the information shared with the Special Education team and specialists as needed. Again, an Action Plan is prepared, with intensive supports and one-on-one interventions. The family is held in close communication during this process.

Each Tier constitutes a 4-6 week cycle, so there is enough time for interventions to be assessed, but children can be moved through the Tiers efficiently so they can get the support they need.

Students with IEPs will receive services, accommodations, and modifications as specified in their IEP. Special education teacher(s) will work with the classroom teachers to provide the necessary accommodations and modifications. Special education students will be integrated into the general education classroom whenever appropriate; they will have the same access to the general education curriculum as their peers. Accommodations during standardized testing will be provided when appropriate, and mirror classroom accommodations will be provided as specified in their IEP protocol. All school facilities will be ADA accessible, and students, regardless of physical and/or learning disability status, will participate in all school culture building activities.



Inclusion

All students benefit from an inclusive education where students of varying abilities learn together. The unique characteristics of the Montessori educational program lend themselves to providing this inclusive environment. All students will be included in all day-to-day functions of the school as well as extra-curricular activities.

The instructional methods inherent in the Montessori approach are particularly appropriate for student populations with a wide range of learning styles and needs. Students who are at risk for academic failure are a diverse group of individuals with a diverse set of needs, and so there is probably no single strategy that can keep all of them in school until graduation. Together, these systems ensure that all students, regardless of starting point, are supported in making measurable academic progress, achieving grade-level proficiency, and developing the independence and executive function skills necessary for long-term success.

Q190. Identify how this curriculum aligns with the proposed charter school's mission, targeted student population, and North Carolina Accountability Model. Provide evidence that the chosen curriculum has been successful with the target student population, how the plan will drive academic improvement for all students, and how it has been successful in closing achievement gaps.



Encompass Montessori's curriculum is directly aligned with the school's mission to deliver high-quality Montessori education for all students, including those who are economically disadvantaged, multilingual learners, and students with special education needs. This commitment is reflected in both the design of the Montessori curriculum and its implementation as an inclusive, developmentally responsive instructional model. The curriculum is intentionally structured to support a diverse student population while also meeting the expectations of the North Carolina Accountability Model through a focus on both academic achievement and student growth.

Encompass will build a representative student body using North Carolina's Weighted Lottery Guidance and is intentionally designed to serve a diverse population. The Montessori model is particularly well-suited to this population due to its individualized, hands-on, and multi-sensory approach to learning. Montessori instruction incorporates language-rich, visual, and tactile materials that support access for multilingual learners and students with disabilities. As the Tier 1 core within an MTSS framework, the Montessori curriculum provides differentiated access for all learners, with additional supports layered through Tier 2 and Tier 3 interventions when needed. Instruction will primarily occur within inclusive classroom environments, with supplemental supports such as targeted interventions and, when appropriate, structured approaches like Orton-Gillingham.

Encompass will use public Montessori resources developed by the National Center for Montessori in the Public Sector to ensure that the curriculum is both high-quality and fully aligned with the North Carolina Standard Course of Study. Montessori materials and lessons are intentionally mapped to state standards to ensure that students meet or exceed required academic benchmarks. Teachers are trained in both Montessori pedagogy and child development, allowing them to deliver instruction that is responsive to individual student needs while maintaining alignment with grade-level expectations.

This curriculum model supports academic improvement for all students through continuous observation, individualized lesson progression, and data-informed instruction. Teachers use ongoing formative assessment, student work, and standardized assessment data to adjust instruction and provide targeted support. The Montessori structure (particularly the uninterrupted work cycle) allows students extended time to engage deeply with content, revisit challenging concepts, and



progress at an appropriate pace. This results in stronger mastery of content, increased student engagement, and the development of executive functioning skills that support long-term academic success.

The curriculum also aligns with the North Carolina Accountability Model, which emphasizes both achievement (80%) and growth (20%). Encompass will monitor student performance across all subgroups, using assessment data to inform instructional decisions and ensure continuous improvement. Students are expected to achieve at Level 3 or above on End-of-Grade assessments beginning in Grade 3, and growth data will be used to evaluate the effectiveness of instructional practices and interventions.

Research demonstrates that Montessori education is effective with diverse student populations and supports both academic achievement and the reduction of achievement gaps. A large-scale study of public Montessori schools in South Carolina (Culclasure et al., 2018) found that Montessori students performed as well as or better than their non-Montessori peers across academic, behavioral, and affective outcomes. The study also found that low-income Montessori students demonstrated greater growth in English Language Arts, math, and social studies compared to their non-Montessori peers, and that Black students showed significantly greater growth in ELA and social studies.

Additional research (Lillard et al., 2017; Snyder, Tong, & Lillard, 2022) found that Montessori students often demonstrate higher proficiency in English Language Arts and comparable or stronger performance in mathematics, with smaller achievement gaps among demographic subgroups. Black, Hispanic, and economically disadvantaged students in Montessori schools were more likely to be proficient in ELA and performed similarly or better in math compared to peers in traditional settings.

These outcomes demonstrate that Montessori education is an effective model for closing achievement gaps. Encompass Montessori expects to replicate these outcomes by implementing a fully aligned Montessori curriculum, maintaining a strong focus on individualized instruction, and using data to ensure that all students—regardless of background—make meaningful academic progress.

Q191. 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.

Encompass Montessori will expect teachers to master a set of core instructional strategies rooted in Montessori pedagogy and aligned to the North Carolina Standard Course of Study. These strategies are designed to meet students at their developmental level while ensuring that all students make measurable academic progress toward grade-level proficiency.

Across all grade levels, teachers will utilize individualized and small-group instruction, along with differentiated learning experiences within extended, uninterrupted work cycles, as described in the daily schedule, which allow students sustained time for deep engagement and practice. Teachers present lessons using concrete Montessori materials that allow students to build conceptual understanding through direct experience before progressing to abstraction. This approach supports deep understanding of academic content, particularly in literacy and mathematics, and leads to stronger long-term retention and application of skills.

Teachers are responsible for carefully observing and tracking each student's progress through the curriculum, using tools such as Transparent Classroom and the Montessori Curriculum to Standards Alignment (MCSA), as part of the school's broader progress monitoring and MTSS framework. This ongoing analysis allows teachers to adjust instruction in real time by re-presenting lessons, increasing the frequency of instruction, or introducing new challenges. These instructional adjustments ensure that students who need additional support receive it promptly, while students who demonstrate readiness are able to advance. This continuous cycle of observation, instruction, and adjustment supports steady academic growth and alignment with state standards.

Q192.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.



Encompass Montessori's instructional plan is designed to ensure that students are prepared to progress from grade to grade and between developmental levels based on demonstrated readiness rather than seat time alone. Through a combination of standards-aligned curriculum, ongoing progress monitoring, and responsive instruction, students are supported in achieving the skills and knowledge necessary to successfully transition to the next grade span.

The Montessori Curriculum to Standards Alignment (MCSA) and Transition Skills Inventory provide the framework for understanding student readiness. The MCSA outlines when students can be expected to master specific skills and content aligned to the North Carolina Standard Course of Study across Kindergarten, Lower Elementary, Upper Elementary, and Middle School. The Transition Skills Inventory identifies the essential academic and developmental benchmarks students should meet before moving from one level to the next, including Kindergarten to Lower Elementary, Lower Elementary to Upper Elementary, and Upper Elementary to Middle School. These tools ensure that progression is based on mastery of key skills and concepts rather than age alone.

Teachers are responsible for closely monitoring student progress through daily observation, lesson tracking, and documentation in Transparent Classroom. Students progress through lessons from introduction, to practice, to mastery, and teachers use this data to determine readiness for new material or advancement. When students are not progressing at the expected pace, teachers adjust instruction by re-presenting lessons, increasing opportunities for practice, or providing targeted interventions through the Child Study process. This ensures that students develop the foundational skills necessary for success at the next level.

The Child Study process, aligned with MTSS, provides additional support for students who require more intensive intervention. Through Tier I, II, and III supports, students receive increasingly individualized instruction based on their needs, with progress monitored in 4–6 week cycles. This structured approach ensures that students are supported in meeting learning goals and are prepared to move forward academically. Students who demonstrate advanced mastery are provided with enriched and accelerated opportunities, ensuring continued growth and readiness for more advanced work.



Within the Montessori classroom, extended work cycles and individualized instruction allow students to engage deeply with content and develop independence, concentration, and executive function skills. These habits of work are essential for successful progression between grade levels and across developmental stages. Teachers guide students in taking increasing responsibility for their learning, supporting their ability to manage work, set goals, and reflect on progress.

At the middle school level, students are provided with opportunities for integrated studies, collaborative projects, and self-expression within structured academic expectations aligned to grade-level standards. This approach supports the development of critical thinking, problem-solving, and real-world application of knowledge. Through continued progress monitoring and targeted instruction, students are prepared to meet high school expectations with the academic skills and independence necessary for success. Students completing the middle school program will have demonstrated readiness through mastery of grade-level standards, completion of integrated academic work, and the development of the academic and executive functioning skills necessary for success in high school.

Students with IEPs will receive services, accommodations, and modifications as specified in their plans, ensuring that they are able to access the curriculum and meet learning goals. All students benefit from an inclusive environment where individualized instruction and ongoing support ensure readiness for advancement.

Q193. Describe in a brief narrative how the yearly academic calendar coincides with the tenets of the proposed mission and education plan.



Encompass Montessori's academic calendar is designed to support the core tenets of the Montessori philosophy and the school's educational program by providing consistent, predictable structures that allow for deep engagement, continuity of learning, and the development of independence. The calendar reflects a traditional school year structure, which supports alignment with community expectations while ensuring sufficient instructional time for students to progress toward mastery of the North Carolina Standard Course of Study.

The Montessori model relies on extended, uninterrupted work periods and consistent daily and yearly rhythms to support concentration, independence, and sustained academic growth. The academic calendar is structured to maximize instructional continuity, allowing students to build and maintain momentum in their learning. Regular attendance and extended periods of engagement across the school year support students in moving from introduction, to practice, to mastery of key skills and concepts.

Within this calendar structure, the balance of instructional time and breaks is designed to support the developmental needs of children. Time for rest and renewal is built into the school year, allowing students to return to their work with focus and readiness to engage. This balance supports the Montessori emphasis on the whole child, recognizing the importance of both academic work and physical, social, and emotional development.

The academic calendar also supports the effective implementation of the instructional program by providing time for teacher collaboration, lesson study, and professional development. Teachers use this time to reflect on student progress, analyze data, and plan instruction that meets the needs of individual learners. This ongoing preparation and collaboration ensures that instruction remains responsive and aligned to both Montessori principles and state standards.

In addition, the calendar provides opportunities for family engagement and communication, which are essential components of the Montessori model. Regular communication with families supports a shared understanding of student progress and reinforces the partnership between home and school.

Together, the structure of the academic calendar supports the key elements of the Encompass Montessori program, including individualized instruction, sustained work cycles, and continuous progress monitoring. This alignment ensures that students are



provided with the time, consistency, and support necessary to engage deeply in their learning and to make meaningful academic progress.

Q194. Describe the structure of the school day and week. Include the number of instructional hours/minutes in a day for core subjects such as language arts, mathematics, science, and social studies. Note the length of the school day, including start and dismissal times. Explain why the school's daily and weekly schedule will be optimal for student learning.



Encompass Montessori will operate with a conventional five-day school week. The school day for all students will be 8:30am – 3:00pm, with teachers on-site from 8:00am – 4:00pm. One day per week, faculty meetings will extend to 5:00pm to allow for collaboration, planning, and professional development. Within the student day, approximately 5.5 hours are dedicated to instructional time, with approximately one hour allocated for lunch and gross motor/outdoor activities.

Montessori makes use of long, uninterrupted work periods during which students may receive several direct lessons (small group or one-on-one) from the teacher while also engaging in independent or collaborative work. Although instruction occurs within extended work cycles rather than fixed subject blocks, teachers are responsible for ensuring that students engage in a balanced academic program each day. Students will spend a minimum of approximately 120 minutes daily engaged in language arts and mathematics work, with science and social studies integrated throughout the work cycle through interdisciplinary lessons and projects. Teachers track student engagement and progress in each subject area through daily observation and documentation, ensuring that all students receive sufficient instructional time aligned with the North Carolina Standard Course of Study.

The daily schedule for Kindergarten and Elementary students is as follows:

8:00 – 8:30 Teachers are on-site preparing for the day, meeting with parents, and collaborating with teacher assistants.

8:30 Arrival and greeting. Students enter the classroom and begin work, often continuing from the previous day. Breakfast is available in the classroom as needed.

8:30 – 11:30 Morning work cycle. Teachers present lessons while students engage in independent or small-group work. Students may also participate in snack preparation and take turns throughout the morning.

11:30 – 12:00 Whole-class meeting for community time, including announcements, read-alouds, discussions, and activities that support critical thinking and communication skills.

12:00 – 1:00 Lunch and gross motor time (outdoor play or gym), providing at least 30 minutes of physical activity.

1:00 – 3:00 Afternoon work cycle. Teachers continue to present lessons and guide student work. Students complete ongoing work, receive additional instruction, and participate in classroom responsibilities before dismissal.



Within the morning and afternoon work cycles, teachers are responsible for tracking student work and ensuring that each student engages consistently in core academic areas. Language arts and mathematics receive daily emphasis through individualized and small-group lessons, while science and social studies are integrated across the curriculum through interdisciplinary studies and projects. Over the course of a week, this structure ensures that students receive consistent and sufficient instructional time across all core subject areas.

Instruction in co-curricular areas, including visual arts, performing arts, and physical education, is incorporated into the weekly schedule. Kindergarten students may engage in these areas within the classroom through individual or small-group work, while students in Grades 1–6 work with specialist teachers in structured sessions. Students participate in these offerings for a minimum of 30 minutes per session and are tracked to ensure regular engagement across all areas.

In middle school, the schedule is adapted to meet the developmental needs of adolescents, providing increased opportunities for integrated studies, collaboration, and self-expression. Students participate in interdisciplinary work, electives, and applied learning experiences while continuing to receive instruction aligned with grade-level standards.

This daily and weekly structure is optimal for student learning because it allows for extended periods of concentration, individualized pacing, and meaningful engagement with academic content. The uninterrupted work cycles support deep learning and mastery of skills, while the balance of academic work, movement, and reflection supports the development of the whole child. Teacher collaboration and ongoing progress monitoring ensure that instruction remains responsive to student needs, resulting in strong academic outcomes aligned with the North Carolina Standard Course of Study.

Q195. Describe a typical day for a teacher and a student in the school's first year of operation.



A typical day at Encompass Montessori reflects a consistent and purposeful rhythm that supports both student learning and effective teaching practice. The structure of the day allows teachers and students to engage in meaningful work, guided by observation, individualized instruction, and ongoing progress monitoring.

The teacher day begins at 8:00am, allowing time for preparation, collaboration, and communication. During this time, teachers prepare the classroom environment, review student progress in Transparent Classroom, and plan lessons based on student needs. Teachers may also meet with teacher assistants or connect with families as needed to ensure a strong start to the day.

Students arrive at 8:30am and enter a calm, prepared environment where they begin work, often continuing from the previous day. Teachers greet students and immediately begin observing, checking in, and guiding students into purposeful activity. This transition into the work cycle supports independence and continuity of learning.

The morning work cycle provides an extended, uninterrupted period during which teachers deliver individualized and small-group lessons while students engage in independent and collaborative work. Teachers present lessons using Montessori materials, track student progress, and adjust instruction in real time based on observation and documentation. Students move between lessons and self-directed work, practicing skills, deepening understanding, and progressing toward mastery. During this time, teachers are actively engaged in presenting lessons, monitoring student work, and ensuring that each student is appropriately challenged and supported.

Midday, students and teachers come together for a whole-group meeting that supports community building, communication, and shared learning experiences such as read-alouds and discussions. This is followed by lunch and outdoor or gross motor time, allowing students to reset and engage in physical activity, which supports focus and readiness for the afternoon.

The afternoon work cycle continues the pattern of individualized instruction and student engagement. Teachers provide additional lessons, follow up on earlier instruction, and continue to monitor progress. Students complete ongoing work, receive targeted support as needed, and take increasing responsibility for managing their work and time.



Throughout the day, teachers are continuously observing and documenting student progress, using this information to inform instructional decisions. Teachers may re-present lessons, provide additional practice opportunities, or introduce new challenges depending on student readiness. Collaboration with instructional coaches and team members, as well as ongoing reflection, supports teachers in maintaining high-quality instruction.

After dismissal at 3:00pm, teachers remain on-site to complete record keeping, plan lessons, communicate with families, and participate in team meetings or professional development. One day each week includes extended time for faculty collaboration, allowing teachers to engage in lesson study, analyze student data, and refine instructional practices.

This daily structure supports both student and teacher success by providing consistent time for deep engagement, individualized instruction, and ongoing reflection. Students benefit from sustained work periods that promote concentration, independence, and academic growth, while teachers are supported in delivering responsive, data-informed instruction. Together, this creates a learning environment that is both structured and flexible, ensuring that all students are able to make meaningful progress aligned with the goals of the Encompass Montessori program.

Q196. Will this proposed school include a high school?

- ☐ Yes
- ☒ No

Q201. Attach Appendix B: Curriculum Outline per Grade Span (for each grade span the school would ultimately serve). One sample curriculum outline (in graph form) in the Appendices for one core subject (specific to the school's purpose) for each grade span the school would ultimately serve.

☒ Upload Required File Type: pdf, image, excel, word, text Max File Size: 30

Total Files Count: 5



Applicant Evidence :


Q201 Encompass Sa...

Uploaded on **4/23/2026**
by **Katie Brown**

Q202. Attach Appendix D: Yearly Academic Calendar (minimum of 185 instructional days or 1,025 hours)

☒ Upload Required File Type: pdf, image, word Max File Size: 30 Total Files Count: 3

Applicant Evidence :


Q202 Encompass 20...

Uploaded on **5/22/2026**
by **Katie Brown**

Q203. Attach Appendix E: Daily and Weekly Schedule Provide a sample daily and weekly schedule for each grade band (K-5, 6-8, and 9-12) the school ultimately plans to serve.

☒ Upload Required File Type: pdf, image, excel, word, text Max File Size: 30

Total Files Count: 15

Applicant Evidence :


Q203 Encompass K-5...

Uploaded on **4/23/2026**
by **Katie Brown**


Q203 - Encompass M...

Uploaded on **4/23/2026**
by **Katie Brown**

11.2. Special Populations and "At-Risk" Students



Q204.Explain how the school will identify and meet the learning needs of students who are performing below grade level and monitor their progress. Specify the programs, strategies, and supports you will provide for these students.



Encompass Montessori will identify and support students performing below grade level through a structured system of screening, observation, and ongoing progress monitoring aligned with the school's MTSS framework. Students will be identified through multiple measures, including classroom observation, student conferences, formative assessment data, and standardized tools such as i-Ready, along with NCMPS Normalization and Adjustment Checklists. Mid-year enrollees, including students with incomplete records or from mobile populations, will be screened within 4–6 weeks of enrollment to ensure timely identification of learning needs.

The school will respond to teacher or parent referrals within 30 days by reviewing available data and determining whether to initiate targeted interventions or further evaluation. The EC Coordinator will serve as the Child Study Lead, guiding the MTSS process and supporting teachers in implementing appropriate interventions.

Support for students performing below grade level is delivered through a tiered system of instruction. At Tier I, classroom teachers provide differentiated instruction within the Montessori environment, adjusting lesson delivery, pacing, and materials based on individual student needs. Teachers closely monitor student progress through ongoing observation and lesson tracking in Transparent Classroom, ensuring that students receive additional support within the core classroom before moving to more intensive interventions.

Students who require additional support progress to Tier II, where targeted interventions are provided in small groups or one-on-one at least three times per week. These interventions are designed to complement, not replace, core Montessori instruction and are embedded within the work cycle whenever possible. Teachers develop Action Plans that include specific interventions, measurable goals, and a defined timeline for implementation. Progress is monitored continuously through data collection and observation, with formal review occurring in 4–6 week cycles. Families are engaged throughout this process, with regular communication and structured meetings to review progress and adjust supports.

Students who do not demonstrate sufficient progress at Tier II may move to Tier III, where more intensive, individualized interventions are implemented. If appropriate, students may be referred for special education evaluation. Encompass will use ECATS to manage referral, evaluation, and service documentation, and a contracted school



psychologist will support evaluation processes. Students with IEPs will receive required services beginning on Day 1 of enrollment, with accommodations and modifications implemented in alignment with their plans.

These systems ensure that students performing below grade level are identified early, provided with targeted and increasingly intensive support, and monitored through a continuous cycle of data-driven decision-making. Instruction is adjusted in real time based on student progress, ensuring that all students are supported in achieving grade-level proficiency and long-term academic success.

Q205. Describe the extent to which one or more of the founding board members has experience working with special populations (students with disabilities, students with 504 Plans, MLs, students identified as gifted, and students at risk of dropping out). If no founding board members have experience working with special populations, describe the school's pre-opening plan to prepare for special populations.



Katie Brown, Ph.D., served multilingual learners and students with disabilities in all of her classroom teaching positions. At Monroe Middle School in Monroe, NC, she led an inclusion 7th grade Language Arts class; the following year, she taught Language Arts for 6th, 7th, and 8th graders identified as academically and intellectually gifted. In her role as an independent study teacher at Audeo Charter School in San Diego, CA, she primarily served students at risk of dropping out who were engaged in credit recovery.

Rachael Shaw Marshall, M.Ed., brings experience working with special populations across her roles as a Montessori educator and school leader. She has worked directly with students with disabilities within inclusive Montessori classroom environments, designing and adapting instruction to meet a wide range of learning needs. In her leadership role at Mountain City Public Montessori in Asheville, NC, she served in a superintendent capacity, regularly participating in IEP meetings and collaborating with families, teachers, and service providers to ensure that students received appropriate support and services. Through this work, she developed a strong understanding of special education processes, compliance requirements, and the importance of individualized, student-centered planning. Her experience reflects a commitment to inclusive practices and ensuring that all students, including those with diverse learning needs, are supported in accessing the curriculum and making meaningful academic progress.

In addition to this Founding Board experience, all Encompass teachers will take a course that has been designed specifically for Montessori teachers who will be working with exceptional children and learning specialists in their general education classrooms. Similarly, the EC-certified Child Study lead will, if not experienced in Montessori, take a Montessori fundamentals course. This will facilitate productive teaming to the benefit of the students. The Child Study lead will begin work with the core administrative team and before the teachers in order to build the systems for information requests, secured files, family communication, etc.

Q206. Explain how the instructional plan and curriculum will meet the needs of Multilingual Learners (ML), including the following:

1. Methods for identifying ML students (and avoiding misidentification).
2. Specific instructional programs, practices, and strategies the school will employ to ensure academic success and equitable access to the core academic program for ML students.



3. Plans for monitoring and evaluating the progress and success of ML students, including exiting students from ML services.
4. Means for providing qualified staffing for ML students.



Meeting the needs of Multilingual Learners (ML):

1. Identification of ML Students (and Avoiding Misidentification):

- **Home Language Survey:** The school will use a Home Language Survey (HLS) to identify students whose primary language is other than English. The HLS gathers information about language(s) the student first learned, understands, and hears, and in what contexts, and the student's language exposure and background.
- **Language Proficiency Screening:** Encompass will screen students identified through the HLS with a standardized language proficiency screening using WIDA-approved screening tools (e.g., WIDA Screener or WIDA ACCESS Placement Test) in accordance with North Carolina requirements to determine their English language proficiency level. Screening will occur within 30 days of enrollment, or within the state-required timeline, to ensure timely identification and service provision.
- **Avoiding Misidentification:** The school will ensure that language acquisition needs are not misinterpreted as disabilities by incorporating language development data into all instructional and intervention decisions.
 - **Multifaceted Assessment:** Encompass will avoid relying solely on one assessment tool, but will consider multiple data points, including observations, classroom performance, and parent input, to gain a comprehensive understanding of each student's language needs.
 - **Differentiation Between Language Acquisition and Learning Disabilities:** Encompass will be mindful of the difference between language acquisition and learning disabilities, and ensure that language proficiency is accurately assessed and that students are not mislabeled as having learning disabilities due to language barriers.
 - **Child Study RTI/MTSS Process:** If concerns arise regarding a student's progress, NCMPs Child Study, a Montessori-aligned RTI/MTSS process, will take language acquisition into consideration.

1. Specific Instructional Programs, Practices, and Strategies for ML Students:

- **Tiered Instructional Approach:** The school will utilize a three-tiered instructional approach to support ML students at varying levels of language proficiency.
- **Tier I (Core Instruction):** High-quality, differentiated instruction in the general education classroom will benefit all students, including ML students.



- **Tier II (Enhanced Instruction):** Small group instruction within the classroom will provide targeted language support.
- **Tier III (Intensive Instruction):** Pull-out sessions with language specialists will provide intensive support for students with significant language needs.
- **Specific Classroom Modifications:** The school will implement classroom modifications to support ML students, including:
 - Teacher proximity for increased support.
 - Direct assistance with attention and focus.
 - Explicit language instruction, including oral language development and vocabulary building.
 - Visual aids and picture systems.
 - Modified language presentations with specific techniques.
 - Multi-sensory pre-writing and writing practice.
- **Montessori Approach:** Montessori instructional strategies lend themselves well to supporting MLs:
 - **Differentiated Instruction** and **Individualized Attention** support the individual needs of ML students.
 - **One-on-One and Small Group Instruction** provide targeted language support and opportunities for interaction.
 - **Multi-Age Grouping** and **Peer Tutoring and Collaboration** foster peer learning and provide opportunities for ML students to learn from their English-proficient peers.
 - **Extra Time on Task, Repetition, and Re-teaching** provide ML students with the necessary support to master concepts.
 - **Multi-Sensory Lessons and Concrete Materials** make learning more accessible and engaging for ML students.
 - **Individual Learning Plans** address MLs' specific language needs and incorporate their strengths.
- **Supplemental Programs:** The school may implement supplemental programs like sign language or visual picture systems to support language development.

These strategies ensure that ML students have equitable access to the core academic curriculum while simultaneously developing English language proficiency.

1. Plans for Monitoring and Evaluating Progress and Success of ML Students, Including Exiting Students from ML Services:



- **Ongoing Progress Monitoring:** Encompass will regularly monitor the progress of ML students using a variety of assessments, including language proficiency tests, WIDA ACCESS assessments and other language proficiency measures, classroom observations, and teacher-created assessments.
- **Data-Driven Instruction:** Data from progress monitoring will be used to inform instruction and make adjustments as needed.
- **Regular Communication with Families:** The school will maintain regular communication with families to keep them informed of their child's progress and to collaborate on strategies to support their language development.
- **Exiting Students from ML Services:** The school will use standardized language proficiency assessments and other relevant data to determine when ML students have attained sufficient English proficiency to exit from ML services. Exit decisions will be made in accordance with state-defined criteria, including proficiency scores and additional academic indicators.
- **Follow-Up Monitoring:** After students exit from ML services, the school will continue to monitor their progress to ensure they are successful in the general education classroom.

1. Means for Providing Qualified Staffing for ML Students:

- **Qualified ML Teachers/Specialists:** The school will hire qualified teachers and specialists with expertise in supporting ML students including staff trained in WIDA standards and English language development (ELD) practices.
- **Professional Development:** The school will provide ongoing professional development for all teachers on strategies for supporting ML students.
- **Collaboration Between General Education and ML Staff:** General education teachers and ML specialists will collaborate to ensure that ML students receive appropriate support.

Resources and Materials: The school will provide teachers with access to appropriate resources and materials for supporting ML students.

Q207. Explain how the school will identify and meet the needs of gifted students, including the following:

1. Specific research-based instructional programs, practices, strategies, and opportunities the school will employ or provide to enhance their abilities.
2. Plans for monitoring and evaluating the progress and success of gifted students; and means for providing qualified staffing for gifted students.



The Montessori approach supports all students, no matter their background or demographics, to excel and grow to reach their full potential and this includes gifted students. The Montessori model, which is so attuned to meeting each individual student's academic, intellectual, social, and emotional developmental needs, is an ideal setting for serving gifted students for several reasons.

- **Multi-year classrooms** mean a wide range of advanced materials are available to students in resource and content-rich classrooms
- **Multi-age classrooms** give students an opportunity to learn from older classmates and support younger classmates, both of which support gifted students develop academically and socially (National Association for Gifted Children. n.d. Grouping (<https://nagc.org/page/grouping>))
- **Differentiation through a self-paced and mastery-based approach and curriculum** allows all students, including AIG students, to progress as quickly as they can to advanced materials (curriculum compacting) when they are able. There is no waiting around or being bored. (National Association for Gifted Children. n.d. Curriculum Compacting (<https://nagc.org/page/curriculum-compacting>))
- **Open-ended materials and project-based learning** encourages gifted students to challenge themselves while exploring their interests through real-world application and collaborative problem-solving.
- **Grace and courtesy curriculum** provides structured social-emotional curriculum through explicit modeling and practice that benefits AIG students as they explore emotions, and social dynamics.
- **Independence, passion projects, and intrinsic motivation** support students in taking ownership of their work, demonstrating autonomy and following through with as much exploration and challenge as they are able.

These research-based strategies, including curriculum compacting, flexible grouping, and project-based learning, are aligned with best practices identified by the National Association for Gifted Children and ensure that students are consistently challenged and engaged at an appropriate level.

References:

- Edmentum. 2024. Classroom Strategies: Teaching Gifted Students (<https://www.edmentum.com/articles/classroom-strategies-teaching-gifted-students/>)



- National Association for Gifted Children. n.d. Gifted Education Strategies (<https://nagc.org/page/Gifted-Education-Strategies>)

In all these ways, the Montessori classroom is inherently designed to serve gifted students. Gifted students will have the opportunity to not only learn the NCSCOS but to pursue topics within these standards at a depth and pace that matches their abilities and nurtures their love of learning. They are able to do this seamlessly, in the same classroom as their peers, supporting their social development and sense of self as a contributing member of a community.

Montessori-trained instructional staff will employ the above strategies in the regular course of executing the individual student-focused curriculum and will provide AIG students with robust opportunities to challenge and grow their critical and creative skills, while providing an unlimited pathway for academic growth. In addition, in our hiring practices, we will seek teachers who already have an AIG license, and will ideally seek to support each Encompass Montessori to earn their AIG licensure from one of the local North Carolina University programs. We will provide 0% interest grants for our teachers to obtain their licensure as our budget allows. Our licensed teacher(s) will serve as coaches for non-licensed teachers and direct supports for the students. In addition to these instructional practices, the school will implement clear processes for identifying, monitoring, and supporting gifted students.

Gifted students will be identified through a combination of classroom observation, student performance data, formal assessments, and collaboration with families and AIG-trained staff. Montessori teachers engage in one-on-one and small group lessons daily, and each child's progress through developmentally-appropriate material allows teachers to identify students who are advancing through materials at a quicker pace and who demonstrate higher levels of cognitive development. These observations and assessments from the teacher will inform the next steps, which will include consultation with an AIG-certified teacher and the family of the student. Monitoring and evaluating the progress and success of gifted students will be done using lesson tracking in Transparent Classroom, student work and work journals, teacher observation, and family communication. Student progress is continuously monitored and used to adjust instructional strategies, ensuring that gifted students are making ongoing academic growth and are appropriately challenged. These systems ensure that gifted students have equitable access to advanced learning opportunities within the core academic program.



If at any point the family or teachers are concerned that a gifted student is not having their needs met and would benefit from further enhancements or approaches, the student can begin on the Child Study process with teachers gathering data from a variety of sources, such as testing (including assessments such as the Stanford-Binet or Naglieri Nonverbal Ability test, as appropriate for better understanding the student), observation, family, student work, etc. and creating an action plan for further enhancing the students school experience and supporting them in being challenged to reach their full potential. Once an action plan is built, the family and student support team will revisit it on ~6 week rotations and refine or expand it as indicated.

In sum, Encompass will meet or exceed the North Carolina Academically or Intellectually Gifted Program Standards and Practices, as articulated in Article 9B (N.C.G.S. § 115C-150.5). 1) Students will be supported in meeting their outstanding abilities no matter their demographic backgrounds and, where there is desire by the parent or more insight needed, offered cognitive testing. 2) There will be comprehensive programming within a culture where diversity is valued and celebrated, allowing gifted students to express and explore their unique pathway within the context of the classroom. 3) Montessori is a differentiated curriculum that allows for self-directed and paced learning. 4) We will seek out and support AIG-licensing. 5) We will work in partnership with families on student education plans, local universities for AIG training, and learn from partner schools and national organizations such as NAGC. 6) Student progress will be assessed alongside the regular academic and developmental student goals continually throughout the school day, through observation, tracking, student work and work journals, family communication, and formal assessments. The school will ensure that AIG services are supported by appropriately licensed staff in accordance with North Carolina requirements.

11.3. 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 education teachers pursuant to law. Public schools are required to provide a full continuum of services to meet the unique needs of ALL students with disabilities.

Q208. Identification and Records 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.

Encompass will ask families for information about special education testing, IEPs, and 504 plans at enrollment. Encompass will also request and review records from previous schools. All records will be reviewed by a team consisting of a lead teacher, an Exceptional Children (EC)-certified teacher, and a school administrator who will ensure that Encompass is ready to meet each student's needs from the start.

Q209. 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. Include how the school will avoid misidentification of special education students.



During the enrollment process, Encompass will ask families for information about possible disabilities and will also review records from previous schools to identify children with disabilities.

The school will also employ a robust model for identifying students who were not previously identified but do, in fact, qualify for special education services. Encompass will share the Child Find brochure from the NC DPI website with families and share Child Find requirements and allowances in staff meetings. All teachers will be trained in NCMPS Child Study protocol (an RTI/MTSS approach for Montessori settings). Teachers will identify and work with children needing additional support using Child Study to ensure all children are receiving the education they need and to give special attention to both current and previously unrecognized disabilities.

The Child Study process (MTSS), with its focus on meeting needs and implementing interventions within the Montessori classroom *before* proceeding to special education testing and services, will help prevent both under- and over-identification of special education students with the goal being accurate identification. Child Study begins with Montessori as the Tier 1 universal instruction model, which includes differentiated and small group instruction for all students. Students who need additional supports progress to Tier II, which provides an action plan with targeted interventions at a higher frequency and 4 - 6 week data tracking and follow-up. Students who are not progressing under Tier II interventions move to Tier III. This thorough, intentional, and documented approach to increasing levels of intervention ensures that students who are able to respond to Tier I, II or III instruction are not misidentified as special education students.

When Tier III (intensive supports) are in place, students may be referred to the Exceptional Children (EC) team. This team will decide the need for educational evaluations and specialized instruction. Parents may also choose to refer their child for testing at any time by providing a written request to the school. The Exceptional Children IEP team will include the family, the Child Study lead (an EC-certified position), and the classroom teacher(s). Encompass will contract with a local school psychologist to provide diagnostic testing. The Child Study Lead will oversee the evaluation process, scheduling the evaluations, receiving the reports, communicating with families and teachers, and facilitating the eligibility determination meeting. The Child Study Lead is accountable to ensure that all NC DPI forms are completed in a thorough and timely manner and that the school is in compliance with the 90-day determination timeframe.



If testing shows that a child does not qualify for special education services, they will continue to receive Tier III intensive individualized interventions with regular Child Study team meetings and careful tracking of progress, effective interventions, and updating of Action Plans. When a student qualifies for a special education IEP, one will be drafted by the Exceptional Children (EC) team, led by the Child Study Lead and in collaboration with the family and classroom teacher(s). The student will receive all specified accommodations and in-classroom support. Where needed, Encompass will contract with specialized providers such as occupational therapists or speech-language pathologists. If a student qualifies for a 1:1 assistant, the school will provide for that, thoroughly orienting the assistant to both the student's needs and the Montessori classroom so they understand how best to support the student within the student's classroom. The EC team, including the parent/guardian, will meet quarterly to review the data, discuss the student's progress, and ensure a productive and positive plan for the student's academic, behavioral, social, and emotional growth.

Student records, including these confidential records on exceptional children and testing, will be kept in a locked file cabinet in an office that is accessible only to staff who have a need and are authorized to view the files and/or share them with families. When the files need to be shared with families, they may be signed out to be reviewed in another room and then promptly returned to the locked file. Digital records will be kept in a password-protected system that complies with FERPA and IDEA guidelines.

Q210. Provide a plan detailing how the records of students with disabilities and 504 Accommodation plans will be properly managed, including the following:

1. Requesting Records from previous schools
2. Record Confidentiality (on-site)
3. Record Compliance (on-site)



Encompass Montessori honors the individuality of each child and believes that all students—no matter what or who—deserve an environment that nurtures their unique potential and allows them to flourish. Our approach to managing records for students with disabilities and those with 504 Accommodation Plans reflects both our legal obligations in accordance with IDEA, Section 504 of the Rehabilitation Act, and FERPA, and our commitment to caring for each child with respect and dignity. We ensure that all records are handled with the utmost care and confidentiality.

1. Requesting Records from Previous Schools

When a student with an existing IEP or 504 Plan enrolls, our Child Study Lead (an EC-certified position) will request records from the student's previous school within 5 school days as an established part of the enrollment protocol. Timely access to these records is essential for continuity of care and to begin planning appropriate supports aligned with the Montessori environment. Records requested will include academic records, evaluations, service histories, current IEPs or 504 Plans, and any related progress data. Our team will follow up regularly, enlisting family support as needed and appropriate, until the records are received. If the records have not been received by the time the student begins attending the school, we will observe the student closely and work with the family to begin integrating their needs into our classroom routines while awaiting documentation.

1. Record Confidentiality (On-Site)

All records related to disabilities or accommodations are treated as sensitive and confidential. Physical records will be stored in locked filing cabinets in a secure administrative office. Digital records will be kept in a password-protected system that complies with FERPA and IDEA guidelines. Access is strictly limited to staff such as the Child Study Lead, school administrators, and licensed instructional staff who work directly with the student or are responsible for implementing or overseeing services. All staff receive annual training on confidentiality, privacy laws, and the importance of safeguarding student privacy.

1. Record Compliance (On-Site)

Compliance with state and federal regulations is non-negotiable. The EC-certified Child Study Lead will maintain all required documentation, ensure timelines for evaluations and reviews are met, and work closely with guides (teachers) to align support services with Montessori practices. IEPs and 504 Plans will be updated annually, or as needed, to



reflect the student's growth and evolving needs. Progress monitoring and service logs will be maintained accurately and reviewed regularly to ensure fidelity and responsiveness. All compliance protocols will be subject to internal audit procedures and the school will respond promptly to any findings or corrective actions.

In keeping with the Montessori approach to data and record-keeping, we view documentation not only as a compliance measure but as a tool for deep understanding. Accurate records help us observe patterns, support independence, and design interventions that are developmentally appropriate and integrated into the learning environment. Our internal review process will ensure both regulatory compliance and alignment with our commitment to holistic, child-centered education.

Q211. Exceptional Children's Programming Explain how you will meet the learning needs of students with mild, moderate, and severe disabilities in the least restrictive environment possible.



Encompass will be fully responsive to the needs of students with all levels of disability.

The Montessori pedagogy is individualized and differentiated in its implementation, with teachers basing their lesson planning on individual students' needs, abilities, and progress through the curriculum. Every student in a Montessori classroom has an individualized approach and plan for learning and this includes students with mild, moderate, and severe disabilities. Several core Montessori principles make the general education classrooms particularly suited to serving children with exceptional needs.

Individualized Instruction: Montessori teachers create individualized learning plans for each child, which naturally aligns with the needs of students with disabilities or learning differences.

Multi-Age Classrooms: These support varied developmental timelines and allow children to progress at their own pace without stigma.

Hands-On, Multi-Sensory Materials: Montessori materials are tactile and visual, benefiting students with sensory processing issues, ADHD, dyslexia, and other learning differences.

Prepared Environment: The classroom is designed to reduce distractions, support independence, and promote calm and order, which helps children with autism, anxiety, or sensory sensitivities.

Best practice in Montessori indicates full inclusion of students with disabilities (www.public-montessori.org) with learning specialists working closely with classroom teachers to coordinate services, along with learning and behavioral interventions, that support all students in accessing the general curriculum. This commitment to least restrictive environments will be Encompass' approach. When assessments, family information, school record, and/or the Child Study process have identified a child for whom additional support is needed, interventions will be made with the goal of serving the child as much as possible in the least restrictive environment—the classroom.



For example:

- In a three-year, mixed-age classroom, it is easy for an older child to work with younger children with comparable skill levels and students with disabilities benefit from peer models and the expectations of the general education classroom.
- In a flexible extended work period, it is easy for a child who needs to move or take a break to do so without disturbing others.
- When a small group or whole class activity leads to follow-up work, this follow-up work is tailored to individual children's needs and abilities.,
- Push-in services can be easily incorporated into a Montessori classroom, given its flexible schedule and individualized approach for all students. In a classroom where students are all working independently or in small groups on different materials and at their own pace, it is not disruptive at all for a learning specialist to be working 1:1 or in a small group with a student(s) needing specialized learning support.

In cases where the student's needs can be better met in a different environment, the goal is to have them out of the general education classroom only for the time needed to meet their essential needs and for them to be able to return to the general education classroom for as much of the day as is possible.

Examples of why/when a student with a special learning need might leave the general education classroom:

- A student who is easily distracted by others around them can benefit from having a first lesson in a separate environment before working on the material in the general education classroom
- A student working with an occupational therapist on gross motor skills would likely leave the classroom for these services
- A student who experiences intense emotion and is struggling to maintain safe and appropriate behaviors might need a quiet place to practice coping skills while they regain their composure and before returning to work in the classroom
- Children needing additional support on social skills might leave the classroom for role play exercises so that they can speak more freely without disturbing others.

Q212. Describe the specific educational programs, strategies, and additional supports the school will provide to ensure a full continuum of services for students with



disabilities. How will the school ensure students' access to the general education curriculum?



Every student at Encompass will have a personalized plan to access the full NCSOS-aligned curriculum and meet the expected learning outcomes. Educational programs, strategies, and additional supports to help students access and master the general education curriculum include, but are not limited to:

- Assistive technology–Students with indicated needs will have access to assistive technologies such as chrome books, computers, noise canceling headphones, video recording, large print books, and calculators to support them in accessing the curriculum and demonstrating their learning.
- Assessment accommodations–Students with indicated needs may be assessed in alternative settings and with accommodations approved by the test developer and the student’s academic plan such as extended time, a reader, paper vs computer based interface, etc.
- Alternative in-class programs–such as Orton-Gillingham can be used with students who are not succeeding in accessing the curriculum through the Montessori materials.
- Pull-out and push-in services–with a trained and exceptional children-licensed teacher
- Fully differentiated instruction within a multi-year classroom–allows all students, including those with disabilities, access to a broad range of curriculum and learning materials that are at their “learning edge” and with which they can challenge themselves and move forward.
- Individualized work within an extended work period–means that interventionists can come and go and move from child to child seamlessly, addressing individual needs without disturbing the flow of the room.
- Hands-on materials–Montessori teaching moves from concrete to abstract as students show mastery. Students who need more time with the concrete materials can have this time without it impacting the learning of others or “holding back the class”. If a student needs additional materials or those from an earlier level, teachers can access those hands-on works and bring them into the classroom for the students who need more time with them.

As noted, all instructional planning will be individualized, however within general categories we can consider the following Montessori specific adaptations to be samples or examples of what may be noted on students’s IEPs.

Area of Need	Montessori-Based Support
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Language Delays	Sandpaper letters, movable alphabet, storytelling, phonics work
Sensory Processing Differences	Practical Life materials, quiet corners, choice of work
Autism Spectrum Disorder	Predictable routines, visual cues, social stories
ADHD	Movement-friendly learning, choices, short work cycles
Dyslexia/Dysgraphia	Phonetic materials, tracing, sandpaper letters, dictation work
Physical Disabilities	Adapted furniture, manipulatives, flexible work arrangements

Q213. Describe the methods and support systems that will be in place to ensure students with disabilities receive a Free and Appropriate Public Education (FAPE).



Ensuring a Free and Appropriate Public Education (FAPE) for all students with disabilities is a foundational commitment at Encompass. We will achieve this through a multi-layered support system that includes:

- **Timely Identification and Evaluation:** Encompass, under the leadership of the EC-certified Child Study Lead will follow NC DPI and IDEA protocols for Child Find and use the NCMPS Child Study protocol to ensure that students are identified early and accurately.
- **Individualized Planning:** When a child has been identified as qualifying for special education services, IEPs and 504 Plans will be developed collaboratively with families, ensuring that services, goals, and accommodations reflect each student's strengths and needs. Student progress against these plans will be revisited in 6-week cycles and plans will be updated and revised to ensure student progress.
- **Inclusive Instruction:** Students will be educated in the least restrictive environment (LRE) to the maximum extent appropriate. Our Montessori model supports inclusion through extended work periods, flexible pacing, small group and individual lessons, and developmentally appropriate strategies.
- **Staff Collaboration:** General and special education staff will co-plan and co-implement instruction. EC staff will support classroom guides to make necessary adjustments so that exceptional children get the instruction that is appropriate for them while also experiencing the many benefits of a Montessori classroom including a beautiful and orderly environment, appropriate choice and responsibility. and mixed-age peers.
- **Ongoing Training:** All staff will receive annual professional development on FAPE, disability awareness, and inclusive Montessori strategies.

These structures ensure that students not only receive the services outlined in their IEPs but also experience a nurturing, respectful, and developmentally appropriate learning environment.

Q214. Describe how implementation of the Individualized Education Plan (IEP) will be monitored and reported to the student, parents, and relevant staff.



The implementation of each student's IEP will be a shared responsibility among the EC team, classroom guides, and related service providers, with the Child Study lead overseeing the fidelity of IEP implementation, ensuring that services are delivered as outlined, that accommodations are consistently in place, and that progress is being noted and IEPs updated.

Monitoring will include:

- **Regular Service Logs:** Learning interventionists (such as occupational therapists) will maintain documentation of each service session, including objectives addressed and student response.
- **Progress Monitoring:** Data that informs progress towards goals will be tracked through observations, work samples, and assessments including standardized screener.
- **Staff Communication:** IEP goals and accommodations will be clearly communicated to all staff working with the student, with periodic check-ins and collaborative planning time built into the school schedule and coordinated by the Child Study lead.

Reporting will occur through:

- **Quarterly Progress Reports:** These will accompany report cards and detail progress toward IEP goals using clear, parent-friendly language.
- **Parent Conferences:** Formal IEP meetings will be held during the first and last quarters of the year, with additional touchpoints offered as needed to ensure families are informed and engaged and that information is flowing smoothly between home and school.

Student Involvement: As developmentally appropriate, students will be involved in self-assessment and goal reflection, in keeping with Montessori values of self-direction and responsibility.

Q215. Describe the proposed plan for providing related services and to have qualified staffing adequate for the anticipated special needs population.



Encompass will employ or contract with certified professionals as needed to deliver all required services as outlined in students' IEPs during the regular school day. This may include speech-language therapy, occupational therapy, physical therapy, counseling, behavioral support, and assistive technology services.

We will build relationships with local service providers and ensure service availability through direct employment, part-time contracts, or partnerships with private agencies. All staff delivering or supporting related services will be appropriately licensed and qualified in accordance with NC DPI standards. Services will be scheduled with sensitivity to the Montessori work cycle and implemented in ways that respect the integrity of the learning environment.

The Child Study lead will be responsible for coordinating schedules and providers, and monitoring quality of services, ensuring clear and frequent communication with families, and establishing and enforcing record-keeping systems. Service providers will be expected to be in close communication with the Child Study lead and classroom teacher.

Staffing will be based on projected enrollment and expected incidence rates of disability, with flexibility to scale as needs evolve.

11.4. Student Performance Standards

Q216. Describe how the school will measure student performance.



Encompass' goals will be guided by the NCMPS/A-GAME assessment framework (NCMPS, 2025. Assessment Guidelines for Authorizers (https://eadn-wc04-7585698.nxedge.io/cdn/wp-content/uploads/2024/10/NCMPS_Assessment_Guidelines_for_Authorizers.pdf)). These guidelines were developed by NCMPS and the Charter School Institute's federally funded A-Game Initiative specifically to speak to and assess the wide scope of student outcomes that Montessori is known for and the pace at which students who enter a Montessori program attain these outcomes.

As such, students will be assessed on academics, executive functions, and social-emotional development. (To date, we are not aware of a feasible measure of creativity that has been developed. If one becomes commercially available, we will incorporate it into our measurements).

Academics

Student academic progress will be assessed in Grades K - 8 using the i-Ready reading and math assessments in addition to teacher observation for formative assessment, the NC beginning of grade 3 reading assessment and end-of-grade exams in grades 3 - 8, and the Transitions Skills Inventories. NC's Read-to-Achieve will be administered to all students at the end of grade 3.

Every student is approached with the belief and expectation that they will perform at or above grade level expectations (Level 3 or above on EOG state exams). When we assess the reading and math performance of Encompass as a whole, we will expect 65% of students to score at or above grade level OR meet a growth percentile of 40, 45, or 50% depending on the number of years they have been at Encompass (NCMPS. 2025. Assessment Guidelines for Authorizers (https://eadn-wc04-7585698.nxedge.io/cdn/wp-content/uploads/2024/10/NCMPS_Assessment_Guidelines_for_Authorizers.pdf)). Encompass' goal is that performance on the NC state tests, including science as required for students in grades 5 and 8, will meet or exceed that of other area schools. The Montessori Skills Inventories will be used for students in Grades K, 3, and 6 to measure their success in meeting the expectations of the 3-year Montessori cycle, recognizing the cumulative nature of growth in this model and considering the time a student has engaged with the Montessori curriculum.



Executive Function (EF)

Students will show EF skills by meeting or exceeding national developmental benchmarks using the Minnesota Executive Function Scale (MEFS). MEFS measures cognitive flexibility, working memory, and inhibitory control. MEFS will be administered at the beginning and end of the year. Encompass's goal is that 80% of students are at or above the 45th percentile on this nationally normed test and/or show measurable improvement since the beginning of the year.

Social-Emotional Development

Students will demonstrate Social Emotional Competency by scoring in the *Strength* or *Typical* ranges on the Devereux Center for Resilient Children's DECA (PK3-5) or DESSA (K-8) assessment, or by showing growth towards these ranges. Expectations for growth and outcomes will be set based on baseline measurements of first-year data.

Q217. 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 the data will be used to inform instruction and improve student performance.



The assessments used at Encompass reflect the school's mission to provide families with an effective, proven, child-centered K–8 public Montessori program in a safe and supportive environment, so students can flourish and become community-centered leaders. Each measure (whether academic, executive function, or social-emotional) is designed to track and support the whole child's development. These assessments guide personalized instruction and ensure that students are progressing meaningfully toward the outcomes that align with the Montessori model and Encompass's broader goal of developing confident, capable, and community-oriented learners.

Our academic, executive function, and social-emotional goals build on this mission by setting high expectations across developmental domains and ensuring each student is prepared for long-term success. The primary assessment tool in a Montessori classroom is the constant formative assessment that teachers and students engage in through the mastery-based curriculum.

- **Student Self-evaluations:** Starting as early as K, students track their progress and prepare monthly self-evaluations to discuss with teachers.
- **Teacher Evaluations:** Teachers will continuously observe and assess students, maintaining records of their progress.
- **Lesson Planning:** Teachers use these assessments in their daily, weekly, and monthly lesson planning for each student. By observing students perform tasks and tracking their progress, teachers know what lesson to offer to what student and when. When administrators meet with teachers they look together at the teacher's lesson planning by analyzing student performance, noting which students may need more lessons, and crosswalking for alignment between student progress and the upcoming lessons the teacher has planned for that student.

In addition to Montessori Assessment practices, Encompass will use i-Ready (or a comparable benchmarking tool) as a standardized formative assessment. i-Ready will show individual student performance and also support teachers in norming their observations of learning to a standardized measure. Here, teachers will look both at individual student scores and also patterns across the class and school. If there are areas where groups of students are struggling, teaching teams will meet in Lesson Study to devise lessons and approaches to support that area.

Students will demonstrate Social Emotional Competency by scoring in the *Strength* or *Typical* ranges on the Devereux Center for Resilient Children's DECA (PK3-5) or DESSA (K-8) assessment, or by showing growth towards these ranges. Expectations for growth



and outcomes will be set based on baseline measurements of first-year data.

The MEFS will be used to measure beginning and of year growth in Executive Function. A strong Montessori environment is correlated with strong EF growth in students. If students are not showing expected EF skills on the MEFS as nationally normed, the school will use the Developmental Environment Rating Scale (DERS) to look closely at the teacher, environment, and child behaviors that may be contributing to or detracting from EF development.

Encompass will utilize additional Montessori-aligned tools, including those developed by NCMPS, to evaluate children's readiness for transition between three-year cycles including tools to assess children's social emotional development. Additional measures we use to evaluate children's social and emotional levels are:

- Montessori Transition Checklist for students moving from primary to elementary
- Ages and Stages Questionnaire (for students younger than 5)
- Normalization or Adaptation Checklists
- Progress Reports
- Teacher observation (running record narratives, and observation tools aligned with Montessori assessment practices, including those found in the NCMPS Montessori Assessment Playbook)
- Parent input
- Student input (for Elementary students)

Because Montessori is a pedagogy of child-led, individually paced learning, children can learn at their level in any grade or environment. However, children who are not emotionally or socially ready may benefit from extra time at the previous level. In addition, teachers must be diligent through the use of tracking tools, like Transparent Classroom or similar systems, along with multiple formative and summative assessments, to ensure that no student progresses without demonstrating adequate academic growth, at a minimum.

The data provided through these measures will drive instruction by offering practitioners guidance on student's strengths, areas needing academic or social support, and how to continually enhance the curriculum for the benefit of students. This collected and analyzed data is the crucial lever for ensuring that every student receives the right lesson at the right time, so they are continuously challenged, learning, and achieving their potential.



Q218.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 provided to students.

Encompass will use the compilation of the above assessments to make data-informed decisions regarding student promotion. Successful promotion will be based primarily on academic readiness, while also taking into consideration executive function skills and social-emotional preparedness. If a lead teacher suspects that a student may not be ready for promotion, they will consult with the school administration and family so that the student is receiving full support and there are no surprises at the end of the year.

Montessori's mixed-age classrooms allow flexibility for students to grow and mature within the broad range of human development. Key transition points, where teachers must communicate with parents if promotion is in question, include Kindergarten to 1st grade (Early Childhood to Lower Elementary), 3rd to 4th grade (Lower to Upper Elementary), 6th to 7th grade (Upper Elementary to Adolescent), and 8th grade to high school.

Students with IEPs or 504 plans will be promoted in line with the provisions indicated in their individual plans. Multilingual learners will be promoted with consideration for the length of time in the school or country and their academic growth trajectory and their social-emotional preparedness.

Q219.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. If serving high school, include plans for students at risk of dropping out.



Encompass Montessori will graduate its first class of 8th graders in the school's 8th year, 2035 - 2036. Encompass will use the current-at-that-time NC Standard Course of Study to delineate the academic skills that NC's 8th grade students are expected to have. Encompass's hands-on, community-embedded, project and mastery-based Montessori middle school curriculum will map onto and be inclusive of these NC expectations and these will, in turn, be aligned to the Montessori adolescent skills inventory.

Students will be expected to demonstrate mastery of at least 80% of these standards, in addition to achieving Level 3 or higher on the NC 8th Grade EOG exams.

Students at risk of dropping out, ML students, and students with IEPs or 504 plans will have similar expectations that may be adjusted depending on their individual learning plans and/or the length of time they've been in the school or in the country, etc. Most importantly, whatever setting graduates transition to for 9th grade, Encompass shares responsibility—with the student and family—for ensuring each student is academically, socially, and emotionally prepared to thrive.

11.5. School Culture and Discipline

Q220. Describe the culture or ethos of the proposed school. Explain how it will promote a positive academic environment and reinforce student intellectual and social development.



Encompass cultivates a learning culture rooted in respect for each other and learning, curiosity and self-direction, and responsibility within the community. Encompass will implement restorative practices as a core approach to community building and conflict resolution, emphasizing accountability, reflection, and repairing harm rather than punitive discipline. Its core ethos is that children thrive when given the freedom to explore within a thoughtfully prepared environment, one that encourages both academic excellence and personal growth. Encompass honors each student's developmental rhythm while guiding them toward mastery through meaningful, hands-on experiences.

The academic environment is structured to support deep focus and active engagement. Classrooms feature Montessori materials that are concrete, self-correcting, and sequenced to support concept development across subjects. Students are encouraged to set goals, manage their time, and reflect on their learning—fostering independence and accountability. Multi-age groupings create natural mentorship opportunities, as older students model leadership while younger peers learn through observation and collaboration.

Teachers will serve as guides (observing, questioning, and facilitating rather than directing) ensuring that learning is personalized and appropriately challenging. Rather than emphasizing external rewards and “working-for-praise”, students are allowed to follow their interests and drive their own learning in a way that brings out their internal motivation as learning, growing human beings who strive for the thrill of challenge and mastery. When teachers discuss students' learning with students, they focus on growth, understanding, and the ability to apply knowledge in real-world contexts.

Social development will be intentionally woven into the school culture. Grace and courtesy lessons will support empathy, communication, and conflict resolution. When conflicts arise, students will be guided through restorative conversations and problem-solving processes that help them understand the impact of their actions, rebuild relationships, and develop stronger interpersonal skills. Community meetings and collaborative projects will give students practice in decision-making, shared responsibility, and leadership. The school will emphasize respect for self, others, and the environment, helping students see themselves as capable contributors to and leaders of their community.



Clear expectations for behavior, grounded in respect for self, others, and the environment, will be consistently taught, modeled, and reinforced across the school community. Together, these practices will build a positive academic environment where students are motivated by curiosity, grounded in self-awareness, empowered to reach their full intellectual and social potential, and learning the skills and proclivities to be community-centered leaders. The combination of the above provide a strong and unique foundation for human flourishing.

Q221. Explain how you will create and implement this culture for students, teachers, administrators, and parents starting from the first day of school. Describe the plan for acculturating students who enter the school mid-year.



Creating and implementing a strong Montessori culture begins with intentional, community-wide alignment around shared values and practices. From day one, Encompass will establish routines, expectations, and relationships that reflect the Montessori ethos (respect, independence, curiosity, and responsibility) for all members of the school community.

For Students: The first weeks of school will focus on orientation to the environment, collaboratively establishing classroom norms, and practicing routines. Lessons in grace and courtesy will set the tone for respectful behavior, while practical life activities will promote independence and self-regulation. Teachers will guide students in understanding their role within the community, encouraging peer-to-peer modeling and mentoring, especially in mixed-age classrooms from 1st - 8th grade.

For Teachers and Staff: All educators will participate in professional development focused on Montessori philosophy, classroom management, and community-building strategies. Regular reflective practice groups including Lesson Study and Child Study will ensure continued alignment and growth. Administrators will support teachers with ongoing coaching and shared decision-making processes that model the lived values of the school community.

For Parents: Before school starts, families will be invited to attend orientation sessions introducing Montessori principles and school expectations. Monthly parent engagement nights and open classroom events will maintain transparency and partnership throughout the year. Communication will be proactive and two-way, fostering a collaborative home-school relationship.

For Mid-Year Entrants: New students will receive a personalized transition plan. They will be paired with peer mentors and supported by teachers through a gradual introduction to routines, materials, and expectations. Parents will receive an onboarding session and access to a series of watch-at-home videos about Montessori to help them support their child's integration into the community.

By intentionally aligning practices across all stakeholders, we will build a culture that is coherent, welcoming, and deeply rooted in Montessori principles.

Q222. Provide a brief narrative that delineates how student conduct will be governed at the proposed charter school and how this plan aligns with the overall mission and



proposed Education Plan. 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 regard 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.



Consistent with the school's commitment to restorative practices described in Section 11, disciplinary responses will prioritize relationship repair, reflection, and skill-building, with exclusionary practices used only when necessary and in accordance with state law.

Creating the culture—At Encompass Montessori, expectations for productive and kind student conduct are woven into the school environment and every interaction, whether between staff, parents, teachers, and/or students. From the start, the message that Encompass Montessori is a school where we take learning seriously, respect students' focus on learning, and support each other in being our very best selves promotes effective culture and discipline.

Encompass Montessori will implement ARC (Attachment, Regulation, Competency) strategies to support children experiencing behavior challenges (www.arcframework.org). **Attachment** is fostered through consistent, nurturing adult relationships and a strong classroom community built on respect and trust. **Regulation** is supported by the Montessori emphasis on predictable routines, freedom within limits, and peaceful conflict resolution, such as through grace and courtesy lessons and the use of a peace table. **Competency** is nurtured by providing developmentally appropriate challenges, allowing children to engage in purposeful work, make choices, and experience success through hands-on, self-correcting materials. Together, these elements create a safe, responsive environment where all children, especially those impacted by trauma, can thrive emotionally, socially, and academically.

Related practices the school will use to promote this culture of caring and positive behavior include:

- Creating and maintaining a beautiful and orderly physical environment inside and out, in both common spaces and classrooms. This beautiful physical environment sends a message of respect for students and their learning. Everyone in the community, including even the youngest students, participate in maintaining this environment.
- Predictable routines and freedom within structure—This reliability is calming to students and especially productive for those who have experienced trauma and for whom unpredictability can cause a state of high alert. Within these predictable routines and structure, students feel safe to exercise their own initiative which supports engagement which, in turn, supports students' experience of competency.
- Showing reverence for students' work—When adults respect the learning process, students are most likely to follow suit.



- Explicitly teaching expected behavior through “Grace and Courtesy” lessons– Rather than assuming that students understand expectations and know how to carry them out, teachers explicitly teach through lessons everything from how to use a tissue in the younger years to how to greet a newcomer or effectively advocate for your needs.
- Collaborative Behavior Agreements–In each classroom, students and teachers work together to create behavior agreements that are then posted in the classroom and referred to as needed.
- Peace Table–Through explicit lessons, students learn how to resolve conflict by listening, repeating what they hear, sharing their perspective, and working towards resolution. Whether it is the peace table in a classroom or the peace bench outside, there are clear spaces that students are accustomed to and use for these intentional problem-solving conversations that may include a teacher but shift as possible to take place peer-to-peer, or include a peer in a mediator role. Students are given explicit support and practice in mediating disagreements.
- Classroom Community Meetings–There is time in the daily schedule in all classrooms to gather as a community and reinforce community norms and the sense of belonging that makes us want to uphold those norms as wanted members who matter to others in the community.

When things go awry–Even with the strongest of cultures and expectations, there are times when students will deviate from accepted behaviors. In instances of minor deviations (distractions, loud voices, running, unintentional slights, etc.), the classroom teacher or other adult will gently redirect the student towards more productive behavior and back to their learning activities. Behaviors that are demeaning, disruptive of other students’ learning, and/or dangerous, must be handled immediately and not allowed to continue. If behaviors are repeated or become a pattern, the Child Study protocol is used to address behavioral supports the same way it is for learning supports. Through the Child Study process, the classroom teacher has the opportunity to meet with families, school administrators, and peer teachers as they work together to deeply understand the student’s unmet needs or lagging skills and develop an action plan with careful monitoring and increasing levels of intervention. The intent is always to return the student to productive engagement with learning and, through that authentic work and focus, (re)establish classroom norms and positive relationships.

Developmentally Informed Responses by Montessori Level



At Encompass Montessori, behavioral responses will be tailored to the child's plane of development. The following considerations help ensure that behavioral supports are developmentally appropriate and aligned with Montessori philosophy:

Kindergarten (First Plane of Development)

Children in the first plane (ages 3–6) are sensorial learners focused on developing independence, order, and language. Behavioral incidents are often tied to unmet needs for routine, attention, or movement. Responses should focus on redirection, guided choices, and restoration of order in the environment. Gentle modeling, short reflective discussions, and re-presentations of grace and courtesy are most effective.

Lower Elementary (Second Plane, ages 6–9)

At this stage, children begin to develop moral reasoning, social identity, and a sense of justice. Misbehavior may arise from social conflicts or a need to test limits. Interventions should include logical consequences, collaborative problem solving, and community meetings. Adults should guide students to reflect on how their actions impact others and foster accountability through supported restitution.

Upper Elementary (Second Plane, ages 9–12)

Older second-plane children exhibit increased reasoning, group affiliation, and abstract thinking. Behavior may reflect power dynamics or identity formation. Restorative practices such as peer mediation, facilitated dialogue, and student-led agreements can be highly effective. Adults should maintain consistency while honoring the child's voice in problem-solving.

Middle School (Third Plane of Development, ages 12–15)

Adolescents in the third plane are developing personal values, autonomy, and belonging. Behavioral challenges may be rooted in emotional volatility, social exclusion, or a need for independence. Adults should respond with empathy, co-created behavior plans, and opportunities for purposeful work. Strong mentor relationships, scheduled check-ins, and access to counseling support are essential to re-engaging the adolescent within the community.

The tables below indicate the processes for addressing unexpected or inappropriate behaviors in the classroom and school environment.



Tier I Approaches (for Non-Dangerous Behaviors)

A simple, consistent framework for addressing non-dangerous misbehavior in Montessori classrooms:

Occurrence	Response	What the Teacher Does	Student Opportunity
Occurrence 1	Gentle Reminders	Teach & reinforce expectations, give general/personal reminders, provide wait time	Make a positive choice independently
Occurrence 2	Private Conversation	1:1 processing later in the day, agree on consequence, document and briefly notify parent	Reflect on behavior, get a "fresh start" the next day
Occurrence 3	Second Private Conversation	Follow up with 1:1, advise student about potential admin. referral, document again, contact caregiver for larger conversation	Make a better choice with added support



Occurrence 4 (Younger students may advance to Tier II supports without this step)	Referral to Admin	Refer to administrator who processes incidents with student and contacts parent, follow up w/teacher and admin.	Reset expectations with administrative support
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Tier II Approaches (for Consistent Disruptions and Behavioral Challenges)

Step	What to Do	Why It Helps
Step 1	Use Adaptation & Normalization and Grace & Courtesy checklists	Identifies developmental/social lag or missed modeling opportunities
Step 2	Document behavior using individual data notebooks	Tracks patterns and ensures decisions are based on evidence
Step 3	Classroom adults and other staff compare notes when student reaches Occurrence 2 or 3; Complete Child Study Summary Form	Builds shared understanding and consistent response across school locations



Step 4	Address environmental challenges: Teachers may student's seating arrangements, work choices, classroom responsibilities, etc. to remove challenging stimuli or situations.	
	Refer for support: lunch bunch, counseling, bullying prevention, home visits	Wraparound supports aligned with ARC (Attachment, Regulation, Competency)
	Provide direct instruction around expected and unexpected behaviors: Books, social stories, etc.	
Step 5	Provide direct instruction and resources for self-regulation: Calming strategies, physical activity breaks, noise cancelling headphones, etc .	
	Set written goals and track progress in regulation, relationships, and routines	Increases predictability and targets developmental growth; collects data that may be needed to demonstrate need for further interventions



Tier III Behaviors and Support Responses

Tier III behaviors are significant, persistent, or high-risk behaviors that require intensive, individualized support and collaboration with specialists and families. At Encompass Montessori, these behaviors will be analyzed and understood through the lens of the Montessori planes of development. Children pass through distinct developmental stages—each with its own sensitive periods, needs, and behavioral expressions. What may appear as defiant or disruptive behavior in one plane may actually be an expression of unmet needs, a bid for connection, or a developmental task being worked through. As such, disciplinary responses must be developmentally appropriate and deeply rooted in observation and analysis.

Consequences for Tier III behavior will be guided not only by the seriousness of the incident but also by the child's age and developmental stage, with the aim of supporting growth, safety, and dignity. This approach ensures that interventions align with the child's inner drive toward self-construction and maintain the integrity of the prepared environment.

Suspension may be appropriate for the behaviors listed and defined below, with the ultimate goal of providing all students with a reset period, bringing to bear necessary resources for adults and children, and developing safety plans for reentry into the classroom. In the very rare case when a possible suspension is being considered, Encompass will work closely with families and students to ensure that all other interventions have been exhausted and to prepare so that the time out of school is as productive as possible and the entry back as smooth and positive as possible.

Tier III Behavior	Description
Physical aggression	Repeated or intense hitting, kicking, biting, or throwing objects that pose danger to self or others
Severe verbal aggression	Threatening language, bullying, or persistent harassment despite Tier II interventions



Self-injurious behavior	Actions such as head banging, cutting, or purposeful self-harm
Property destruction	Damaging classroom materials, furniture, or property in a way that disrupts or endangers others
Chronic elopement	Running away from the classroom or building in an unsafe or repeated manner
Sexually inappropriate behavior	Language or actions that are developmentally inappropriate or harmful
Persistent noncompliance	Ongoing refusal to follow directions leading to disruption or safety concerns, despite Tier II support
Severe emotional dysregulation	Intense dysregulation that creates unsafe conditions for self or others, despite regulation strategies

Encompass Montessori supports students as they learn the social, emotional, and executive function skills to be in control of their behaviors and choices. Encompass will not use corporal punishment. A student who is at risk of causing harm to themselves or others will be removed from the setting and taken to another location or office where a qualified adult(s) will support the student in calming down and regaining control until they no longer pose a threat. School administrators (Principal, Child Study Lead) will support classroom teachers in these instances.



Encompass will abide by state law for offenses involving firearms or other weapons, including the state's allowance for the Board to modify the required suspension on a case-by-case basis and, regardless of the offense, the requirement for manifestation determination and continued services in the case of a student with disabilities.

Q223.Exclusion or expulsion must abide by the due process required under 115C-218.60 and the Charter Agreement. If the school intends to utilize exclusion or expulsion, please explain how the school intends to utilize, how this will be communicated to parents, and how the school will ensure alignment with state law including Article 27.

- § 115C-218.60. Student discipline. The school is subject to and shall comply with Article 27 of Chapter 115C of the General Statutes, except that a charter school may also exclude a student from the charter school and return that student to another school in the local school administrative unit in accordance with the terms of its charter after due process.



Encompass Montessori will utilize suspension, exclusion, and expulsion only in rare circumstances and in full compliance with North Carolina General Statutes, including Article 27 and §115C-218.60. These measures will be considered only after all appropriate interventions and supports have been implemented, except in cases involving immediate threats to safety or as required by law.

In alignment with the school's restorative and developmentally appropriate approach to discipline, exclusion or expulsion will be used as a last resort. When such actions are necessary, the school will ensure that decisions are made based on the severity of the behavior, the student's developmental stage, and the effectiveness of prior interventions.

Parents and guardians will be notified promptly of any suspension, exclusion, or expulsion, and will receive written documentation outlining the reason for the action, the length of the exclusion, and the student's rights. Encompass will ensure that all due process requirements are followed, including the opportunity for families to participate in meetings, present information, and appeal decisions as outlined in state law and the school's grievance procedures.

For students with disabilities, Encompass will adhere to all applicable federal and state requirements, including conducting manifestation determinations and ensuring the continuation of educational services during any period of suspension or exclusion.

Through these procedures, Encompass Montessori will ensure that all disciplinary actions are fair, transparent, and aligned with both state law and the school's commitment to supporting students' growth and development.

Q224. This subsection is entirely original and has not been copied, pasted, or otherwise reproduced from any other application.

- ☒ Yes
- ☐ No

Q225. Explanation (optional).

11.6. Certify



Q226. This subsection is entirely original and has not been copied, pasted, or otherwise reproduced from any other application.

☒ Yes

☐ No

Q227. Explanation (optional):



12. Operations

12.1. Transportation Plan

Q228. Describe in detail the transportation plan that will ensure that no child is denied access to the school due to lack of transportation. Include budgetary assumptions and the impact of transportation on the overall budget. The details of this plan should align with the mission, identified need for the charter school, targeted student population, and the budget proposal. If you plan to provide transportation, include the following:

1. Describe the plan for oversight of transportation options (e.g., whether the school will provide its own transportation, contract out for transportation, attempt to contract with a district, or a combination thereof) and who on the staff will provide this daily oversight.
2. Describe how the school will transport students with special transportation needs and how that will impact your budget.
3. Describe how the school will ensure compliance with state and federal laws and regulations related to transportation services



Access to safe and reliable transportation is critical to our mission of providing equitable educational opportunities. Our transportation plan is designed to ensure no student is denied enrollment due to transportation barriers. It aligns with the school's mission, the needs of our target population, and our proposed budget through a phased and flexible approach.

Phased Approach to Transportation Services

Phase 1 – Year 1: Carpool Support and Community-Based Solutions

To begin, we will facilitate a robust carpool system:

- **Parent Transportation Coordinator** (an existing administrative staff member) will:
 - Collect student location data to identify carpool opportunities.
 - Develop and share carpool guidelines and safety procedures.
 - Serve as a liaison for transportation needs and organize parent information sessions.
- **Community Partnerships** will be explored with local organizations (e.g., the YMCA, the Zebulon Boys and Girls Club) for support or shuttle services.
- **Public Transit Evaluation:** We will assess local public transit options and share access guidance with families.

Phase 2 –When Budget Allows: Contracted Transportation

With anticipated enrollment growth, we will expand transportation options:

- **RFP Process:** Solicit bids from private school transportation providers with emphasis on safety, reliability, and cost-effectiveness.
- **LEA Collaboration:** Engage with the local district to explore shared services or route space, as allowed by NC charter policy.
- **Pilot Program:** Launch a limited-route pilot to assess quality, cost, and scalability.

Phase 3 – Long-Term: In-House Transportation (as needed)

Should our enrollment and budget support it, we will assess the feasibility of operating our own school bus fleet, including:

- Vehicle acquisition or lease



- Driver hiring and training
- Maintenance and compliance infrastructure

Oversight and Management

- **Daily Oversight:** In Phase 1, the Parent Transportation Coordinator manages daily support and troubleshooting.
- **Contracted Services Oversight:** The Assistant Principal will manage vendor relationships, contracts, routes, safety procedures, and compliance reviews.
- **In-House System Oversight:** The Assistant Principal will oversee all transportation staff, vehicle maintenance, and safety operations.
- **Leadership Accountability:** The Assistant Principal maintains overall responsibility for implementation and compliance; the Board will approve contracts or major system changes.

Transportation for Students with Special Needs

We are committed to full inclusion and access:

- **Individualized Transportation Plans (ITPs)** will be developed in coordination with families and special education teams when transportation is included in a student's IEP or 504 plan.
- **Specialized Contracts:** If needed, we will work with providers who offer accessible vehicles and trained aides.
- **LEA Coordination:** We will explore district partnerships for special education transportation services.
- **Budget Impacts:** These services will be reflected in a dedicated budget line and adjusted based on enrollment and student needs.

Compliance with Legal Requirements

We will ensure full adherence to all transportation regulations:

- **State and Federal Laws:** All providers and systems will meet NC DPI and federal transportation guidelines.
- **Driver Requirements:** All drivers must pass background checks and hold valid CDLs with required endorsements.
- **Vehicle Safety:** All vehicles will undergo regular inspections and maintenance per NC DOT guidelines.



- **Training:** Staff and students will receive age-appropriate safety and emergency procedure training.
- **Documentation:** We will maintain records on driver credentials, routes, maintenance, and incident reporting.
- **Policy Updates:** Transportation procedures will be reviewed annually to ensure ongoing compliance.

Budgetary Assumptions and Impact

Transportation will be a strategic budget investment, with costs evolving across phases:

- **Phase 1 (Minimal Costs):** Includes coordinator time, materials for carpool guidance, and outreach sessions.
- **Phase 2 (Moderate Costs):** Includes vendor contract fees, route management, special needs transport, and oversight staffing.
- **Phase 3 (Significant Costs):** Includes bus purchase/lease, insurance, staffing, fuel, maintenance, and compliance fees. A feasibility and cost-benefit analysis will precede any move to this phase.

We anticipate transportation expenses will increase as enrollment grows. Costs will be clearly detailed in the budget proposal and managed to ensure sustainability. We will also explore grant opportunities and state/federal funding where applicable.

12.2. School Lunch Plan

Q229. 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. If the school intends to participate in the National School Lunch Program, include the following components in the response:

1. How the school will comply with applicable local, state, and federal guidelines and regulations;
2. Any plans to meet the needs of low-income students; and
3. Include how the school intends to collect free- and reduced-price lunch information from qualified families. If a school intends to participate in the Community Eligibility Provision, describe the methodology the school will use to determine eligibility.



Encompass Montessori Charter School is committed to following all relevant local, state, and federal guidelines, particularly those related to the National School Lunch Program (NSLP). This includes adhering to USDA meal pattern requirements, maintaining accurate records, and ensuring staff receive necessary nutrition training. The school will also comply with state policies for reporting and food safety, and local health department regulations and wellness policies.

A priority is ensuring meal access and equity for low-income students through free and reduced-price meals, and by minimizing any potential stigma associated with this. The school will also explore programs like CEP to further support student nutrition.

To gather information relative to the CEP from parents, the school will use a communication strategy that includes application distribution, reminders through various channels, and opportunities for application support. The school will attempt to eliminate any stigma associated with economically disadvantaged status, keep confidentiality in this process and conduct annual reviews and follow-up to ensure accurate data and maximize participation.

12.3. Civil Liability and Insurance

The Nonprofit shall name the SBE as an Additional Named Insured to their liability coverage for operation of a charter school while obtaining and maintaining insurance at a minimum in the following amounts:

1. Errors and Omissions: one million dollars (\$1,000,000) per occurrence;
2. General Liability: one million dollars (\$1,000,000) per occurrence;
3. Property Insurance: For owned building and contents, including boiler and machinery coverage, if owned;
4. Crime Coverage: no less than two hundred fifty thousand dollars (\$250,000) to cover employee theft and dishonesty;
5. Automobile Liability: one million dollars (\$1,000,000) per occurrence; and
6. Workers' Compensation: as specified by Chapter 97 of NC General Statute, Workers' Compensation Law



Q230. Attach Appendix L: Insurance Quotes

- 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.

☒ Upload Required File Type: pdf, image, excel, word, text Max File Size: 30

Total Files Count: 5

Applicant Evidence :

	
Q230a NC Charter A...	Q230b NC Charter S...

Uploaded on **4/23/2026** by **Katie Brown**

Uploaded on **4/23/2026** by **Katie Brown**

12.4. Health and Safety Requirements

All public charter schools are required to follow the regulations regarding health and safety as stated in G.S. 115C 218.75.

Q231. We, the Board members 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. The Board Chair must sign this question.



Signature

Kethan

12.5. Start-Up Plan

Q232. Provide a detailed start-up plan for the proposed school, specifying tasks, timelines, and responsible individuals (including compensation for those individuals, if applicable).



The Start-Up Plan is detailed in the chart below.

We have been active in the local community, attending events, meeting with families, and hosting information sessions. We will continue this work to ensure our enrollment is strong and that we build a school community that is strong and cohesive even before we open the doors. Our calendar below lists the cadence of our meetings, and we have a more detailed plan in the marketing session.

We also have launched a website and begun our social media channels. We will be adding content and developing these outreach tools each month, with the goal of the content becoming a great tool for incoming parents of Encompass Montessori and a great Montessori resource for all. We also run email campaigns throughout the planning year to ensure families enroll early.

The entire founding Board of Directors will be responsible for preparing our Encompass Montessori school to open successfully, but the following list identifies who will take point in each effort. These are all unpaid activities.

The Board Chair (Katie Brown) will be the point person for engaging with the authorizer, recruiting the Executive Director, connecting with the Montessori community for staffing, and any contractual matters.

The Treasurer (Alexis Weddings) will be the point person on identifying and securing vendor proposals to bring to the board and seek local business partners for direct-to-school donations and support. She will also oversee any financial elements of the school build/renovation.

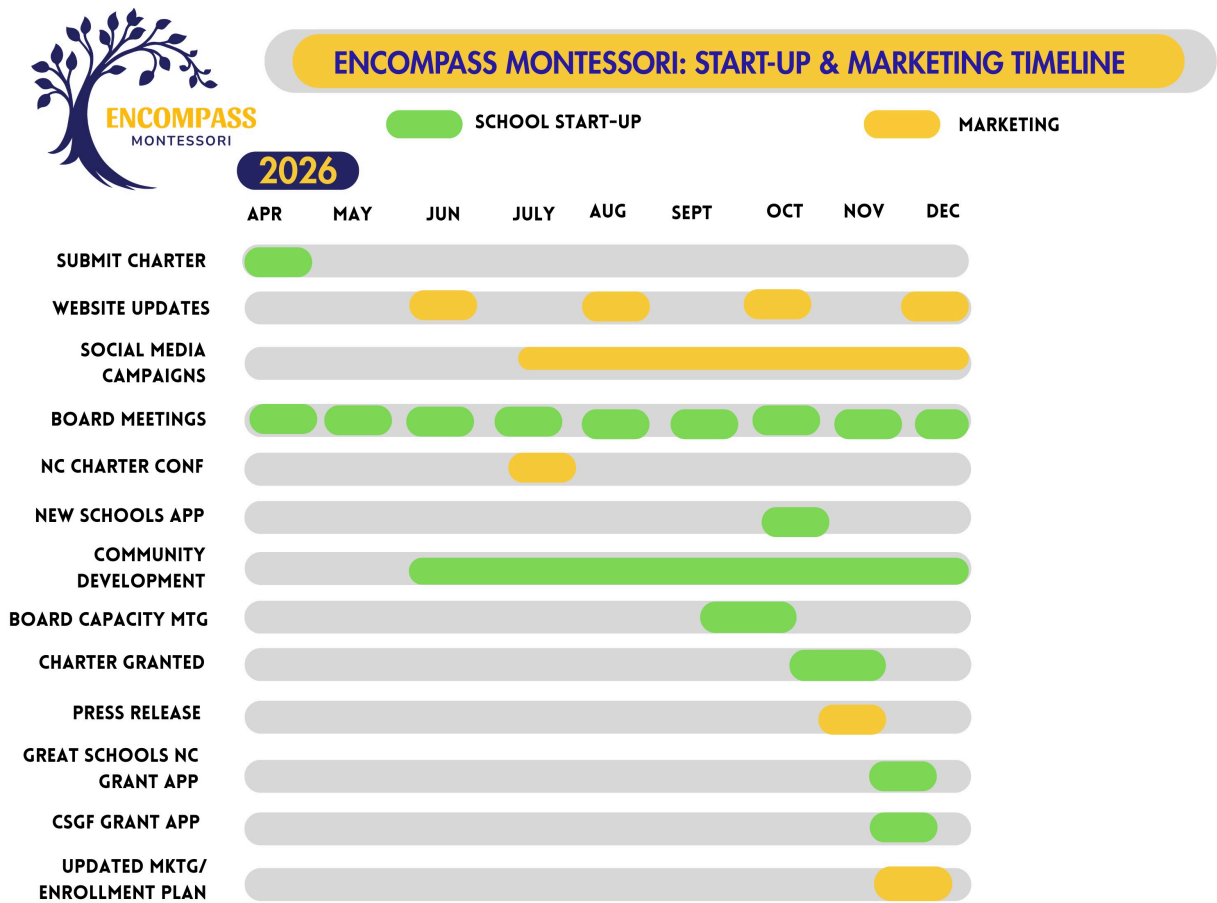
The Secretary (Rachel Shaw Marshall) will be the point person for all compliance issues, website and email updates, and she will oversee the Owner's Rep for the facilities project.

Board Members (Karyn Farmer and Kelly Bradford) will collaborate on identifying and applying for grants and to head-up the community development efforts.

Pending grant approval, we will hire our Executive Director (ED) as soon as possible. If grants for the work are not obtained, we will secure a bridge loan to support their salary in advance of opening. We will cover our marketing expenses and will seek additional partners and support on hosting our community events.



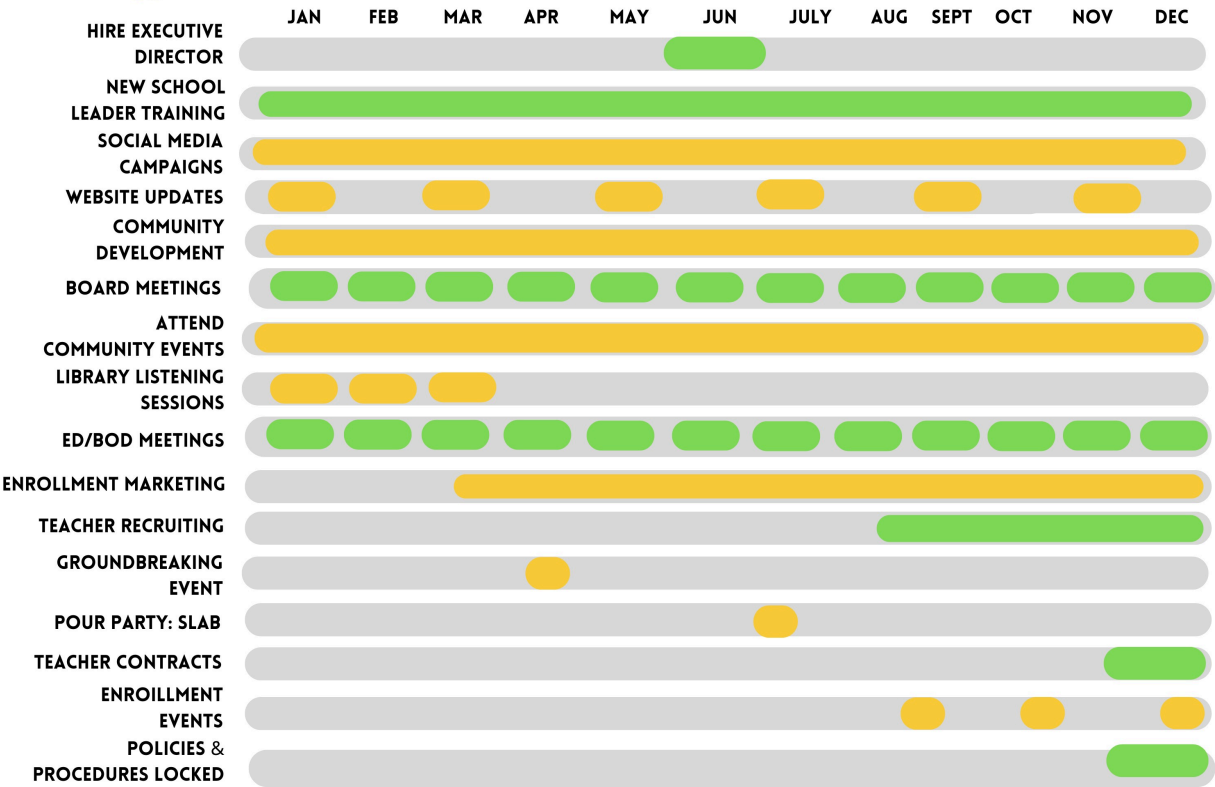
Our BOD will reach out to their network to begin recruiting qualified staff prior to the Executive Director’s hiring to get the process started, including posting on national and local Montessori and teaching sites, and on our own social media channels and website. Once the ED is hired, they will focus on staffing and, (alongside the Board of Directors) community development.





ENCOMPASS MONTESSORI: START-UP & MARKETING TIMELINE

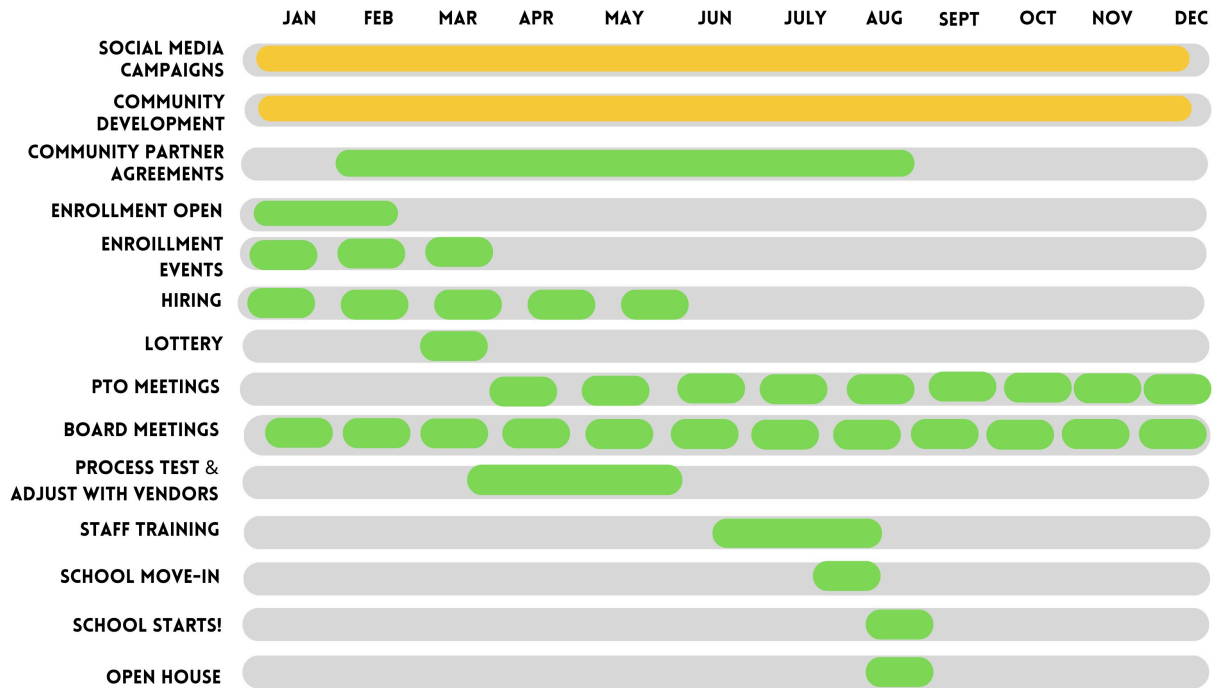
2027





ENCOMPASS MONTESSORI: START-UP & MARKETING TIMELINE

2028



Our Board of Directors has been active in the communities in and around Knightdale, sharing with parents our proposed school, and we will continue to have a presence at events. Our 2026-2027 schedule of community events is attached.

Applicant Evidence :



Q232 2026 & 2027 C...

Uploaded on **4/24/2026**
by **Katie Brown**

Q233. Describe what the board anticipates will be the challenges of starting a new school and how it expects to address these challenges. Submit a Start-up (Year 0) Budget as



Appendix O, if applicable.



Starting a new school is a familiar endeavor for most of our board members, who have been involved with launching innovative educational models and in building facilities for students from multiple perspectives, including that of being founding board members of a new school previously.

From this experience, we have learned to prioritize the following items:

1. Community engagement
2. Financial foundations of stability
3. Quality educational leaders, staff, and teachers.

Community Engagement stands as a core value of a school. Hiring our Executive Director over the summer will allow those connections to begin early and develop over two years until we open our doors, which will result in strong relationships that will benefit the school and the community.

Community Engagement activities are developed in the Marketing section, but our experience informs us that a robust and active group of community members will help our school thrive. We will use our website initially, and then have a multi-faceted approach to connecting with community members: parents, local businesses, local preschools, and local officials. Each one of these stakeholders has a vested interest in quality education, and in our experience, they will become active partners as we conduct regular one-on-one meetings and events, in addition to developing our online presence as experts in public Montessori education.

We aim to launch our PTO as soon as the lottery is pulled, so we can pull in the valuable resources of our families and start establishing strong bonds. Staging projects like “Dig in the Dirt Days” to allow families with young children and community partners to connect and contribute forges strong bonds and shares the feeling of ownership of the school with the community it serves.

As we reach out in the community, our number one goal will be to listen. We want to know what families are really missing and needing for their children, so we can create a well-rounded school experience for everyone. Establishing this culture of collaboration is critical for families and communities to feel comfortable not only voicing their concerns, but also in sharing their dreams. We want to know what their dream for their children and their community is, so we can learn how to be a partner in bringing it to life.



Financial Foundations of Stability can seem daunting if you do not have experienced founders who are intimately familiar with the realities of a public Montessori charter school.

Start-up dollars are important to help us launch on the right footing, so we have time to test-and-adjust the financial policies and procedures, as well as exploring ways to be more efficient in our spending.

Our team will be applying to the CSGF Seed program, New Schools Venture Fund, and Great Schools North Carolina, among other charter school grant programs.

Our Treasurer, Alexis Weddings, has vast experience managing back office services for charter schools, and she will be setting up our back office with the most efficient and cost-effective methods available to keep us focused on putting more dollars into the classrooms and spending less on the business operations.

We have strong board policies already established, based on our collective years of experience, but we will be doing a deep dive into our financial processes and procedures to identify other methods to be more efficient, effective, transparent, and safe with our finances.

Our board maintains that the long-term financial stability of the school and what is best for the children are the two pillars upon which decisions will be made, so our policies and procedures reflect our values. When there is alignment between all stakeholders, including the authorizing body, we create rock solid financial foundations that will help our school succeed.

Quality Educational leaders, staff, and teachers. The National Center for Montessori in the Public Sector is a non-profit solely dedicated to creating, maintaining, training, and support quality Montessori education by supporting both administrators and teachers. Their materials, trainings, reviews, and assessments are the gold standard which all public Montessori schools seek to uphold.

Our board member from NCMPS, and her network of resources, will keep our school connected to quality teachers and administrators, as well as afford us the opportunity to be on the cutting edge of their research in how to best empower this new generation



of students within the Montessori framework.

The decision to launch with K and 1 was to create a strong cohort from the very first year with educators who are certified in teaching and in the Montessori method. Establishing robust training programs in-house that utilize the A-Game Assessments will launch the school's educational mission on solid ground, along with the expectations for teachers, staff, and leadership all to commit to this particular model of education.

All staff and board members will be introduced in-depth to the Montessori method and why it works so well for public school students. We will also hold regular sessions for families and community members to learn how to bring Montessori concepts of empowerment and our peace education outside the classroom.

By being a paragon of the model we execute, we will attract the teachers, staff, and leadership who are mission-driven and excellent practitioners. Our grace and courtesy extends to staff, faculty, administrators, and board, so we keep the culture of empowerment and peace with fidelity. When staff and faculty feel valued and heard, they also feel a sense of ownership in the success of the school, and when we establish that from the recruiting stage, and make it a priority, it happens.

Our recruiting has begun by sharing our intention to serve the families of Wake county with a public Montessori school, and our NCMPs board member has begun reaching out to leaders in her network who embody the type of servant leadership we most need.

12.6. Facility

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.

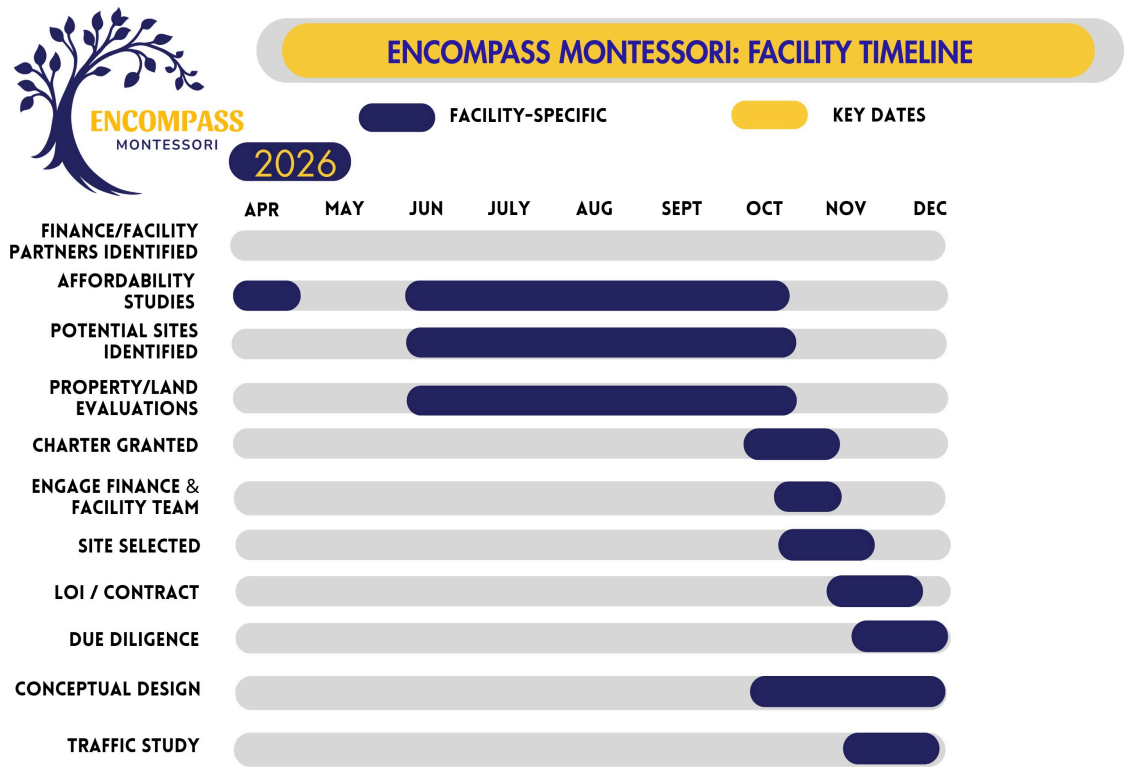
Q234. What is your plan to obtain a building? Identify specific steps the board will take to acquire a facility and obtain the Educational Certificate of Occupancy. Present a timeline



with reasonable assumptions for facility selection, requisition, state fire marshal and health inspections, and occupation.



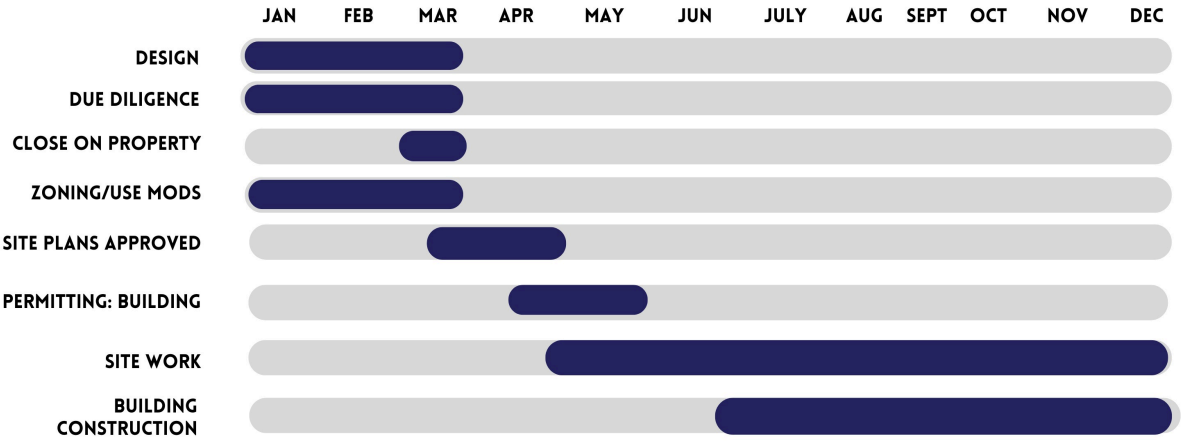
The provided timeline depicts both start-up and building activities because they are interdependent. The Board of Directors intends to work directly with Epic Change Education as Owner’s Rep, 22Beacon as Developer/Financier, and Hubrich Contracting as General Contractor, to create an agreement to identify, develop, and build a ground-up school or renovation for Encompass Montessori to call home. All three entities are well-versed in the requirements for a school to open, including selecting an appropriate site, obtaining the necessary variances for a charter school to locate there, as well as all of the environmental, traffic, and impact studies that are needed and to follow the processes for obtaining all necessary inspections and permits for construction and occupancy. Each jurisdiction has nuances in their own timelines, like how many meetings are needed with the planning commission, and these will be factored into a detailed timeline. Ample time will be provided to pass all inspections necessary (including building, health, fire and safety) to obtain our Certificate of Occupancy (CO) in time to open.

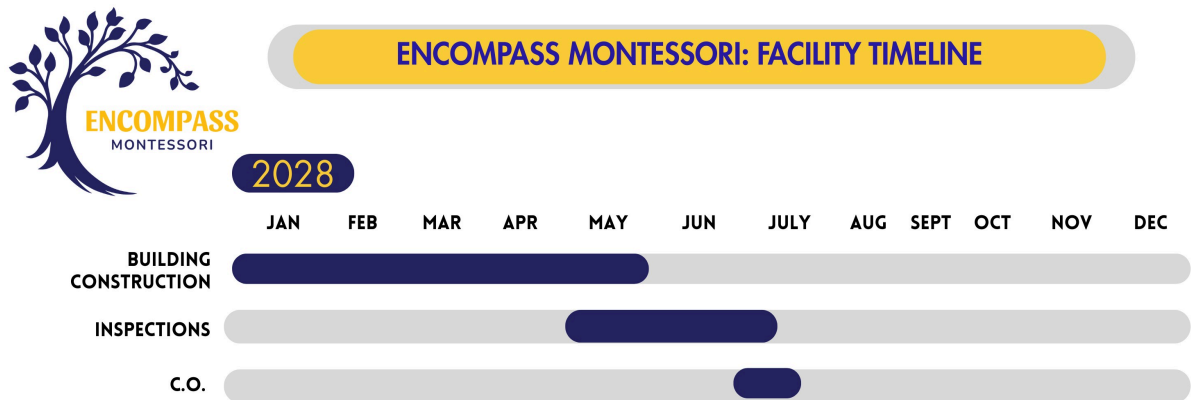




ENCOMPASS MONTESSORI: FACILITY TIMELINE

2027





Q235. Describe the school’s facility needs based on the educational program and projected enrollment, including: number of classrooms, square footage per classroom, classroom types, common areas, overall square footage, and amenities. Discuss both short-term and long-term facility plans. Demonstrate that the estimate included in your budget is reasonable.



The program for the facilities needs is below, which details the number of classrooms, square footage per classroom, classroom types, common areas, overall square footage, and amenities. Because we are seeking to open in 2028, our plan is to pursue the permanent facility first, with a clear understanding of how construction timelines can be impacted by everything from supply chains to weather.

Our goal is to build a campus with enough land for classroom gardens, ample outdoor play and exploration space, that connects our students with nature. We will work diligently with our partners to realize this vision. As with any building project, a myriad of delay-causing issues can manifest, from zoning to permitting to acts of nature. We will be in constant engagement with our facilities and finance team and assess our progress as a board each month. If it appears that a delay may impede our successful opening, we will pivot to securing a temporary facility., i

If it is determined that a temporary facility is needed in Year One, we would need to accommodate a total of 144 kindergarten and first-grade students. Our space needs would be approximately 8,000 square feet. We are confident a suitable temporary space will be located that can meet all regulatory, fire, safety, and health guidelines necessary to receive a Certificate of Occupancy by July of 2028.

Please see the Facilities Program Guide below that details the desired spaces at capacity.

The design of the permanent facility may also be a phased approach. Depending on the property we acquire or seek to renovate, there may be economical options for phasing the build. We are seeking to create a home-like atmosphere for our students, with a “village” feel. There are many pathways to be able to achieve that aesthetic, and we will be working with the facilities team to find the solution and create the schedule that is most effective and economical for our school.



Encompass Montessori: Wake County Facilities Program						
Classrooms	Enrollment	Students	Rooms	SF/Room	Total SF	Faculty
K	96	24	4	800	3,200	12
Lower-el (1st-3rd)	288	24	12	800	9,600	12
Upper-el (4th-6th)	288	24	12	800	9,600	12
Middle (7th & 8th)	192	24	8	800	6,400	2
TOTAL:	864		36	-	28,800	38
EDUCATIONAL / INSTRUCTIONAL			Rooms	SF/Room	Total SF	Staff
Multi-Purpose Space w/ Warming Kitchen and Stage			1	3200	3200	
Resource Center (Library & Media)			1	800	800	1
Art			1	800	800	1
Music			1	800	800	1
Science / Maker Lab			1	800	800	1
TOTAL:			6		6,400	5
ADMINISTRATIVE			Rooms	SF/Room	Total SF	Staff
Main Office Reception			1	200	200	1
Main Waiting / Entry Lobby			1	150	150	1
Executive Director			1	180	180	1
Principal			1	120	120	1
Assistant Principal			1	120	120	1
Registrar			1	100	100	1
Guidance/ Social Worker			1	100	100	1
Administrative Assistant			1	100	100	1
Student Support Team: MTSS/Child Study			1	300	300	1
Instructional Coaching Center			1	300	300	3
IT Staff			1	100	100	1
Health Aide / Clinic (Include Toilet & Shower)			1	200	200	1
"Flex" Conference / Work Room			2	200	200	2
Copy / Office & Student Supply Room			1	100	100	-
File Room (Secure)			1	80	80	-
Conference Room			1	300	300	-
Office Bathroom			1	60	60	-
Staff Break Room			1	400	400	-
Staff Bathroom			1	60	60	-
TOTAL:			21	-	3,170	13
SERVICE AREAS			Rooms	SF/Room	Total SF	Staff
Custodian / Mop & Clean Supply Room			2	80	160	4
Stairs			0	250	0	-
Elevator			0	60	0	-
Electrical / Telecommunication / Internet Services			2	60	120	-
Mechanical Room			1	120	120	-
TOTAL:			5	-	400	4





2025 NC CHARTER SCHOOL APPLICATION				
NET BLDG SF TOTAL		38,770		45 NSF/Child
OVERALL GSF (Building Factor @ 1.3)		50,401		59 GSF/Child
EMPLOYEE TOTAL:				92
PLAYGROUNDS / OUTDOOR LEARNING ENVIROMEN	Number	SF	Total SF	Staff
Primary Playground	1	10,000	10,000	0
Elementary Playground	1	25,000	25,000	0
Parks & Gardens	1	15,000	15,000	0
Soccer Field (100 yards x 50 yards - US Youth Soccer)	1	45,000	45,000	0
Individual Outdoor Classroom Areas (Secure and adjacent to building)	19	500	9,500	0
Outdoor Pavilion	1	8,000	8,000	0
TOTAL:			112,500	0
OUTDOOR SERVICE AREAS	Number	SF	Total SF	Staff
Outdoor Work Shed / Storage	1	300	300	0
Trash Enclosure	1	250	250	0
Perimeter Security Fencing	1	TBD	0	0
TOTAL:			550	0
PARKING: 192 TOTAL. 96 guest. 96 employee. 4 disabled.				

Q236. Describe school facility needs, including: science labs, art room, computer labs, library/media center, performance/dance room, gymnasium and athletic facilities, auditorium, main office and satellite offices, workroom/copy room, supplies/storage, teacher workrooms, and other spaces.



With our unique model of education, our classrooms need to be larger to accommodate students who sit on rugs, use tables for individual and group work, and access the materials, which are accessible to students to direct their own learning. Traditional rows of desks are not used. The materials line the classroom walls and are specifically grouped by subject matter and ordered by level of rigor.

A Montessori classroom is a “prepared environment,” which means that the work is placed in easy reach of the students and furniture is sized appropriately. Bathrooms are typically in the classrooms, not down the hall, so students can practice self-regulation and their ownership of their physical bodies is reinforced.

Sink, refrigerators and prep areas are also typical in a Montessori classroom and will be on the plans for the facility. Because students eat in their classrooms, a large cafeteria is not needed, but a warming kitchen to provide lunches for students on Free & Reduced Lunch programs and to be able to host school events is needed.

Music, Art, Science/Maker Lab, Resource Center (library and media) and Flex Space will be included to provide specials and places for more dedicated work and additional materials and equipment that might be needed—musical instruments, science tables, etc. In the classrooms, basic art, music, and science materials can be found, but these spaces allow for deep dives into the specials.

Our Gross Square Footage of the facility is estimated at 50,401, which is 59 GSF/Child for a total eventual student body of 864. At 45 Net Square Foot/Child, this exceeds the minimum square footage per child, as defined by North Carolina state statute.

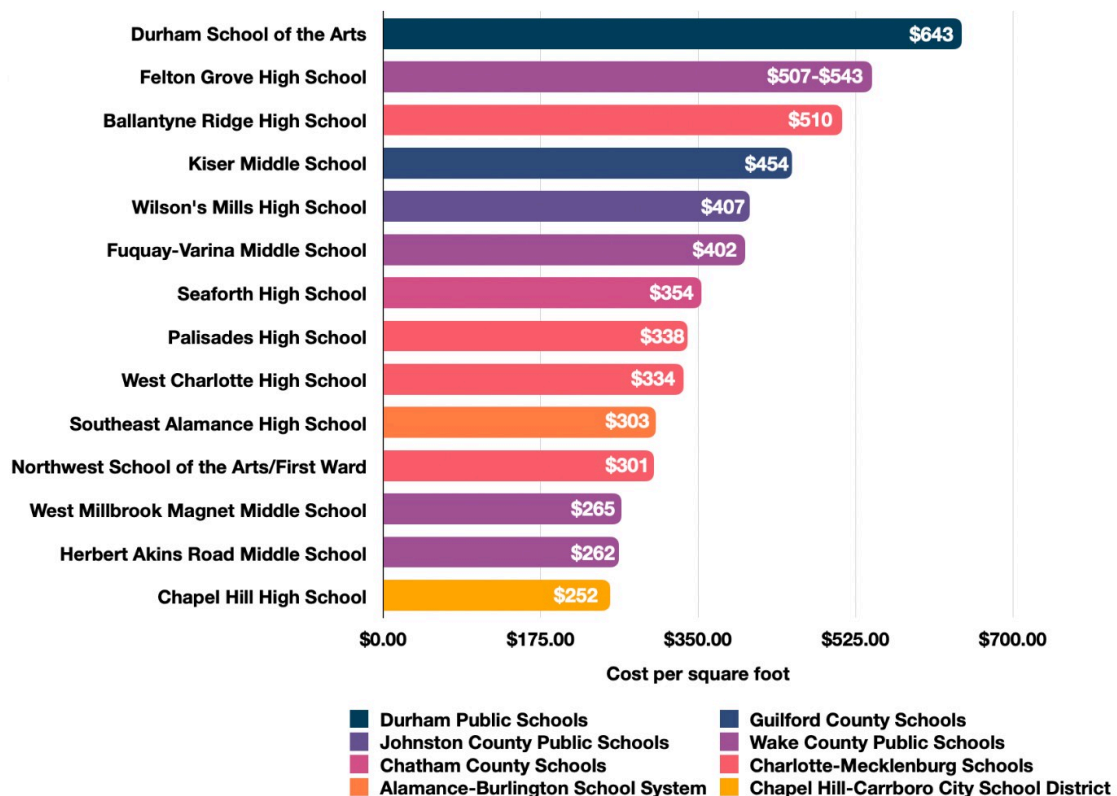
We will also have outdoor classrooms, gardens, a pavilion, and a youth-sized soccer field to promote wellness and a connection with the outdoors for our students and staff. Staff break room and bathroom, conference room, health clinic, work/copy room, a multipurpose room for indoor activities will all also be included to provide an effective working environment and a strong school experience.

Q237. 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.



In an analysis by the 9th Street Journal, the most currently completed schools in the area range from \$252 to \$643 per square foot. Wake County Public Schools recent Fuquay-Varina Middle School (completed in 2024) was reported to have cost \$402 per square foot. Wake County's Fuller Elementary K-5 was reported at \$293.54 per square foot in 2021. (North Carolina Department of Public Instruction. 2022. Costs of Recent School Projects (<https://www.dpi.nc.gov/documents/schoolplanning/school-costs-project/download>))

Durham arts school is priciest



Kempczinski, L. 2024. At a quarter-billion dollars, Durham school's price tag dwarfs its peers (<https://9thstreetjournal.org/2024/08/22/at-a-quarter-billion-dollars-durham-schools-price-tag-dwarfs-its-peers/>)



We are estimating \$350 per square foot for current budgetary purposes, due to the most recent construction projects and current market conditions, and in consultation with our national and local building partners. Building a K-8 tends to skew a little higher in price than a K-5 but lower in price than a High School.

We will be evaluating temporary spaces, long-term renovation spaces, and ground-up builds in order to make the best fiscal decision for the school that also provides the appropriate educational facilities for our students.

Non-profit developers, like 22Beacon, create affordable financing structures for schools to lease-to-own their facilities. Lease payments are often interest-only or partial interest-only for the initial years and grow with the school's enrollment. This initial financing can remain in place until the bond market rates are favorable and the school's enrollment is stable, so the school can qualify for the best rating and rates.

(Clark, P. 2024. 2024 UPDATE: Commercial Construction Cost per Square Foot in the US (<https://www.clarisdesignbuild.com/2024-update-commercial-construction-cost-per-square-foot-in-the-us/>))

Potential back-up rental facilities are approximately \$19/square foot, according to a recent LoopNet review. If tenant improvements are needed, we will secure a TI loan via the landlord, or one of our finance partners.

During Year One, we will only require approximately 10,000 square feet. If it makes better financial sense for the short and long-term interests of the school, we will explore a temporary space. This space can either be portables on the land we are developing for the permanent facility, or it can be a shorter-term lease while we secure the necessary financing and/or complete the construction of the new facility. We will also consider a phased build, if it is more economical and feasible for our timeline.

Q238. 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.



With a projected opening date of August 2028, we will seek to build or renovate suitable facilities first, and we will identify a suitable temporary space for our opening year with 144 students, in case it is needed. Spaces that are available currently are not likely to be available in August 2027, so we will utilize the services of local realtors when, and if, the plans to build a custom facility do not appear to be feasible. In December 2027, our proposed construction will be well underway and we will have a clear understanding of the likelihood of a timely delivery and will make any necessary pivots to a temporary facility.

The facility program has already been completed, and the proposed facilities team of ECE, 22Beacon and Hubrich Contracting are poised to work with the founding board on refining the school's program based on what parcels of land or renovation opportunities exist, so once the charter is received, the architectural and development teams can move quickly.

Having a property secured in 2026 or early 2027 for a ground-up build affords us enough time to construct the school prior to opening in August 2028. If a temporary facility is needed due to unforeseen construction or financing delays, school programming will not be impacted. Because we are launching with Kindergarten and first grade only, their needs are manageable within the context of multiple types of spaces from churches to strip mall bays to available preschools.

We will also explore a phased build, depending on what land or property we find to renovate, which can aid in delivery times and budgetary restrictions. We can launch in portables on the land where our permanent facility will be, after the appropriate site work is completed. We also can explore with the facilities team building out a portion of the school at a time. A phased build would be preferable to an offsite temporary space, if property is secured, so we can start establishing Encompass Montessori in its permanent home from the start.

Q239. Describe the board's capacity and experience in facilities acquisition and management, including managing build-out and/or renovations, as applicable.



Board of Directors members have launched and built charter schools from a variety of vantage points, and understand first-hand the complicated nature of zoning, permitting, building and the approvals process.

We have a team in place to support execution of our facilities plan, which will be overseen by the Board Treasurer and the Board Secretary. The Board Secretary brings experience from the launch of a North Carolina charter school, where she worked in close partnership with a facilities director during a ground-up development process, contributing to cross-functional coordination and ensuring alignment between the educational program and facility design.

We may engage Epic Change Education to provide Owner's Representative services. Epic Change Education has extensive experience in charter school builds, including ground-up Montessori preschool and K-8 campuses, and has served as Owner's Representative, Project Manager, and consultant on multiple charter school development projects. ECE, or another contracted Owner's Representative, will report directly to the Treasurer and Secretary and serve as liaison with potential partners 22Beacon and Hubrich Contracting to ensure the project meets the educational and financial needs of the school, is delivered on time and on budget, and that contingency plans (including temporary facilities, if needed) are in place.

Our intended funding and financing partner 22Beacon has funded more than \$85 million of charter school construction, creating over 100,000 student seats, and over 8.5 million square feet of safe, modern, and efficient educational facilities. As a non-profit, their mission is central to their business practices, so each school receives the most economical and effective facilities solution.

Our intended General Contractor partner Hubrich Contracting is an expert in North Carolina, with over twenty years of experience, a deep base of subcontractors and a thorough understanding of local and state building requirements. With over 54 charter school builds under their belt, we have the utmost confidence in this team to deliver on-time and on-budget.

12.7. Certify



Q240. I certify that this subsection is entirely original and has not been copied, pasted, or otherwise reproduced from any other application.

☒ Yes

☐ No

Q241. Explanation (optional):



13. Financial Plan

13.1. Charter School Budget

All budgets should balance indicating strong budgetary skills. Any negative fund balances will, more than likely, generate additional questions by those evaluating the application. 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.

Q242.If applicable, attach as Appendix M: Revenue Assurances. Assurances are needed to confirm the commitment of any additional sources of revenue.

N/a

Q243.Attach as Appendix N: Proposed Budget for Year 1 through Year 5 [Click here to access and download the Budget Template \(https://www.dpi.nc.gov/2026-nc-budget-template-final/download?attachment\)](https://www.dpi.nc.gov/2026-nc-budget-template-final/download?attachment) "Please be advised that Google Sheets is not supported for use with the NC charter budget template. Due to the functions running on the back end of the workbook, it is required that applicants use: Excel 2021 or later (PC and Mac). Excel for Microsoft 365 Subscriptions (PC and Mac Versions) Excel Online"

☒ Upload Required File Type: excel Max File Size: 30 Total Files Count: 5



Applicant Evidence :



Q243 Encompass Mo...

Uploaded on **4/24/2026**
by **Katie Brown**

13.2. Budget Narrative

Please include additional information that explains the assumptions used in the 5-year budget.

Q244. **Provide the break-even point of student enrollment.**

The break-even point of student enrollment is 136 for year 1.

Q245. **Discuss the school's contingency plan to meet financial needs if anticipated revenues are not received or are lower than estimated.**



As the main driver of revenue is student enrollment, we will be staffing according to our numbers. Personnel costs are the majority of our budget, so we will not hire without the assurances that we have full classrooms for the teachers to support. We are hiring our Teacher Assistants as part-time (30 hours/week), and will also staff them as we confirm our enrollments. Fewer materials will be needed as well, so those costs will naturally lower.

We will construct our lease or lease/purchase that will grow with our enrollment. It will be much lower in years one-three, so we can ensure to meet the lease obligation while we build our strong community of families. Our potential finance and facilities partner 22 Beacon is a CDFI with Federal Government loan guarantees, which provides them the flexibility and security to support lower initial lease payments for us.

We also can access bridge loans from a variety of national and local sources to help address funding gaps.

Our fundraising efforts will begin shortly after the charter is granted, so we can start building a fund to support the school and its operations. We have already begun building relationships and applying for philanthropic support with organizations like New Schools Venture Fund, Great Schools North Carolina, and Charter School Growth Fund, and our board will be applying for other national, regional, and local grants to support our school's unique programming. These funds will offset operational costs, so we can be more nimble in adapting for any unexpected financial losses.

Q246. 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. Also, describe any committed contributions and in-kind donations of goods or services to be received by the charter school that will assist in evaluating the financial viability of the school. Clearly indicate between those grants or in-kind donations which have already been firmly committed and those the board is planning to pursue. Be sure that the appropriate assurances documentation is provided in the appendices.



No. The submitted budget does not rely on any sources of funds other than state, county, and federal per-pupil allocations.

We will be applying for Great Schools North Carolina, New Schools Venture Fund, and Charter School Growth Fund grant programs to support Year Zero and Year One expenditures, as well as the NC GROW CSP Grant. If additional funds are needed, we will pursue a bridge loan with a CDFI to ensure the most favorable terms.

Q247. Provide the student to teacher ratio that the budget is built on.

1:24 on actual teacher to student ratio. In a Montessori school, each classroom has a Teacher Assistant, which would change the ratio to 1 adult per 14.4 students.

Q248. Describe the board's individual and collective qualifications and capacity for implementing the financial plan successfully.



The Encompass Montessori Board of Directors brings strong individual and collective expertise to successfully implement and oversee the school's financial plan. Katie Brown, Ph.D., serves as Director of Research and Professional Learning at National Center for Montessori in the Public Sector and has extensive governance experience, including nine combined years on the boards of public Montessori charter schools where she served as treasurer, secretary, and governance committee chair. Her background in curriculum and instruction, combined with board-level financial oversight experience, supports sound fiscal decision-making.

Rachael Shaw Marshall brings more than twenty years of Montessori experience across classroom teaching and school leadership, including her role as Curriculum Director for a North Carolina public charter school, where she contributed to program implementation within a public funding framework and worked closely with leadership teams on strategic planning and resource allocation.

Alexis Weddings contributes deep financial expertise as the owner of ASW Financial Services, LLC and an accountant with Narron CPA, with over 22 years in the finance industry and 12 years specializing in charter school finance in North Carolina. Her experience in budgeting, compliance, and financial management ensures strong oversight of public funds and adherence to regulatory requirements. Collectively, the Board combines expertise in finance, governance, and public Montessori education, positioning it to responsibly manage resources, ensure financial sustainability, and successfully implement the school's financial plan in alignment with its mission.

Kelly Bradford's experience working as a school leader in a local charter school gives her experience working with school funding and budgets and understanding the policies that guide the implementation of those funds and budgets. Her experience provides both the practical, pragmatic experience along with the strategic thinking that must undergird those decisions. She also brings experience partnering with PTO organizations as they collaborate to support the mission of the school.

As a seasoned nonprofit leader, Karyn Farmer brings experience delivering high-quality results within fiscal constraints. She understands how to think creatively about tapping into community resources to support the mission of the school.



Q249. Describe how one or more high needs students with disabilities might affect the budget and your plan to meet student needs that might be more than anticipated.

North Carolina has a one time contingency fund for students with high needs disabilities, which would support any needs during Year One. In subsequent years, the budget has more room to accommodate high needs students with disabilities.

Our Montessori model includes one teacher and one teacher assistant to be able to provide a higher level of support in the classroom for all students, and we have already budgeted for an individual EC teacher from our first year. The set-up of a Montessori classroom also provides integrated opportunities to diversify the educational experience to serve a multitude of differing abilities. Research (<https://amshq.org/wp-content/uploads/2024/03/ams-2024-poster-presentation-montessori-charters.pdf>) conducted by the National Alliance for Public Charter Schools and the National Center for Montessori in the Public Sector found that students receiving special education services performed at higher levels on standardized reading assessments than students receiving special education services in other charter and traditional settings. A study (<https://azcharters.org/2024/04/24/montessori-evidence-based-reading-curricula-a-review-of-data/>) of reading outcomes in public Montessori schools in Arizona produced similar findings, with advantageous outcomes for students with disabilities.

If we encounter a student with disabilities that are far beyond our capabilities, beyond the aforementioned contingency fund, we will work with the student's family and Wake County Public School System to identify what other supports can help the student succeed.

Q250. If there is a plan to outsource any or all financial management areas such as payroll, benefits, audits, fundraising, accounting, etc., provide a statement on how the vendors will be selected and how the board will oversee their activities to ensure fidelity and compliance.



Vendors for these services will be selected in accordance with our Financial Policies and will be overseen directly by our Board of Directors Treasurer. Transparent, real-time, methods to ensure quality and shorter term contracts will allow us to monitor effectiveness and pivot to different providers, if we see these providers are not executing effectively.

Q251. 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.



The school intends to contract for additional PT ,EC, Psych and OT Services as needed to serve our students. Custodial will be on a contract basis as well, but as the school grows, and budget allows, we may consider hiring an on-staff custodian.

In accordance with our Financial Policies, we will obtain three quotes for any purchases over \$10,000 and evaluate them as a board to ensure that the right fit for our needs is selected. Our evaluation process will include reference checks, pricing analyses, and contractual obligations with exit clauses, in case we are not happy with the services.

For any services that exceed \$250,000 in annual expenditures, we will issue a Request for Proposals (RFP) and seek a minimum of three bids. Our RFP will include transparency, reporting, accountability, and evaluative metrics, alongside the full scope, as well as a clear understanding of the Board's authority to cancel any contracts at our discretion.

Safety and security requirements, like background checks and references, will also be required and/or performed by the school to ensure any third-party vendor meets the highest standards. Any, and all, requirements from the Wake County Public School system and any North Carolina state statutes regarding vendors in schools will be adhered to.

It is important to evaluate RFPs not only on a price and scope basis, but also on reputational and experience metrics. Vendors with a track record of serving charter schools with excellence, who are mission-oriented and understand the Montessori method, as well as the realities of charter school funding and operations are critical to support an efficient and effective school operation.

Q252.Explain how the budget aligns with the school's mission, curricular offerings, transportation plans, and facility needs.



The budget aligns directly with the mission: Montessori schools are designed differently than traditional schools. There is an instructional assistant in every core classroom. Materials are purchased and used instead of textbooks. The environment is utilized in all aspects of the curriculum, including practical life. In Year 1, each classroom will have a part-time assistant, and as the school grows, assistants will become full-time to provide additional dedicated support.

Curricular offerings: Because the Montessori curriculum is delivered through hands-on Montessori materials, the operations budget focuses heavily on instructional materials, with fewer dollars allocated to textbooks and computers.

Instructional materials purchases in the early years will focus on materials appropriate for younger grades, with additional age-appropriate materials added as our student population matriculates into higher grades. Our Montessori materials are covered each year in the line item indicated and we will be incorporating additional FF&E and materials into our build/renovation budget. Our budget also includes a robust line for professional development to support our teachers in developing a deep understanding of Montessori and how to effectively serve all learners through the Montessori curriculum.

Notes on Other Key Curricular costs:

Student information and instructional systems such as:

- Transparent Classroom, budgeted at \$24 per student annually.
- Infinite Campus at an estimated \$5,000 per year.
- I-Ready Reading and Mathematics Assessment at \$16 per student annually.
- The Developmental Environment Rating Scale (DERS) is budgeted at \$600 in Year 1 and \$730 in Year 2+.

Technology needs are intentionally limited in the Montessori environment and primarily used for assessment. We budgeted a 1:2 student-to-device ratio.

Transportation: In the initial years, we will spearhead a ride-share/carpool program with parents, and we will assess which locations for shared bus pick-ups and drop-offs would be most effective for our families. We will assess the interest and need for bus



service and we will evaluate the prospect of owning and maintaining our own buses, or contracting with a commercial busing provider. The costs will be added if we determine this is appropriate for our school.

We are also exploring partnerships with the YMCA and the Zebulon Boys and Girls Club to potentially provide transportation to and from their before-and-after care programs.

Facilities: In Year One, we are exploring multiple options. We have allocated a facility amount that is affordable for our small opening population. The annual amount was based on typical square foot rental amounts in Wake County, and we seek to keep our facilities costs between 15-20% of our overall budget.

We will work with our proposed financing and facilities partners to determine whether a ground-up build or renovation lease/purchase option, or if a simple lease will be best suited for our school, based on affordability.

Our intended facilities finance partner, 22Beacon, is a CDFI, who specializes in mission-driven charter schools. Their turnkey non-profit development program puts the costs and risks of purchasing and developing a custom or renovated facility on the developer. Based on affordability, the lease amounts will be set and approved of by our board. Payments will be graduated to grow with our student population, and any interest not paid will be capitalized. We will lease from 22Beacon until it is the right time for our school to refinance, potentially with a bond, to buy the school. The numbers in our budget are typical for this type of deal structure, as well as to cover a direct lease option.

Q253. What percentage of expenditures will be the school's goal for a general fund balance? Describe how the school will develop the fund balance.

Our goal would be 3% annually, after year one through efficient operations and effective fiscal management. By Year 5, we anticipate our cumulative annual fund balance to be approximately 10%. We will balance what is best for the long-term financial stability of the school and what is best for our students in every decision. Our Finance Committee will review the budget monthly with the school leader, and a full report to the board from the leader on our fiscal position will be a component of every board meeting, so we can ensure we are always on track to meet the 3% and operations are successful.



Q254. Provide a description of proposed financing structure. Include financing of facilities, other asset financing, and leases.

Financing facilities is the second most significant cost for the school, next to personnel and is detailed below. Other asset financing, like a potential bus purchase, or a copier lease, would be managed by the head of school and the finance committee, according to the limits and rules set out in our Financial Policies.

To finance our facility needs, we are proposing to work with a nationally-renowned CDFI and non-profit developer, 22Beacon. The process begins with a review of our financial projects, including our projection of what is affordable facilities-wise. That number is the driver to determining a facilities budget. We will potentially engage with an Owner's Rep, like Epic Change Education, and General Contractor, like Hubrich Consulting on evaluating properties and renovation spaces to fit within our affordability number.

Together, we will evaluate temporary leases, purchases and lease-purchases through a variety of financing mechanisms to determine which is best for the long-term financial stability of the school and what is best for our students. The board will vote on the approach that meets this criteria and will work with our partners to execute the facility. We will also ensure a contingency space is identified to mitigate any construction risk.

A typical structure for schools working with a non-profit developer on a lease-purchase would be for the school to pay interest-only, or a portion of the interest on the loan in the first three years. Any interest not paid in these years is capitalized. As the school grows its student body, revenues increase, and the lease payments will also increase. Once the school population is robust, and when the bond market timing is right, utilizing the services of a Municipal Financial Advisor to enter into the bond market to purchase the facility from the developer would be the next step. This process can last over a year, but the result is most often a lower debt service payment and eventual ownership of the facility.

Q255. 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.



The school will purchase or lease furniture, fixtures and equipment (FF&E) as needed to execute the educational model. We will work with our facilities finance partner to incorporate these expenses into our build/renovate budget and overall financing package.

13.3. Financial Compliance

Q256. How will the school ensure adequate internal controls, including segregation of duties, safeguarding of assets, accurate and adequate record keeping?



The Board of Directors will ensure a robust system of internal controls to promote financial integrity, accountability, and transparency. While the school will contract with a qualified third-party vendor to provide financial and accounting services, the Board will retain full oversight and responsibility for all financial operations.

To ensure segregation of duties, responsibilities will be clearly divided between the third-party provider and school leadership. The vendor will handle day-to-day accounting functions such as transaction processing, payroll, and financial reporting, while school leadership and the Board will maintain authority over approvals and oversight. No single individual or entity will control all aspects of a financial transaction. For example, expenditures will require proper authorization by designated school personnel, while the vendor will process payments and maintain records. Bank reconciliations and financial reports prepared by the vendor will be reviewed regularly by the Board Treasurer and Finance Committee.

To safeguard assets, the school will implement strong internal control policies, including approval thresholds for expenditures, separation of approval and payment functions, and secure access to financial systems. The Board will require regular review of bank statements, cash flow reports, and financial statements. The third-party provider will be required to adhere to strict internal control standards and provide timely, accurate financial data.

For accurate and adequate recordkeeping, the third-party vendor will utilize a reputable financial management system to ensure all transactions are recorded in accordance with generally accepted accounting principles (GAAP). Monthly financial statements, including budget-to-actual comparisons, will be prepared and presented to the Board for review and approval. All financial records will be maintained in an organized and secure manner to ensure audit readiness and compliance with state and federal requirements.

The Board will establish a Finance Committee to provide ongoing financial oversight, review policies, and monitor the performance of the third-party provider. In addition, the Board will procure an independent external auditor through a competitive process. The auditor will conduct an annual audit and report directly to the Board, providing an additional layer of accountability.



Through this structure, combining a qualified third-party financial services provider with strong Board governance, the school will maintain effective internal controls, safeguard assets, and ensure accurate and transparent financial reporting.

Q257. Provide any known or possible related party transactions (relationship, description of transaction, and estimated dollars involved).

None

Q258. Provide the name of the firm approved by the NC Local Government Commission (LGC) that will conduct the audit. Include the complete mailing address, telephone number, and fax number. If a firm has yet to be identified, please list the firms the board has investigated.

Sharpe Patel
5510 Six Forks Road
Suite 140
Raleigh, NC 27609
T: 919-341-4187

13.4. Certify

Q259. I certify that this subsection is entirely original and has not been copied, pasted, or otherwise reproduced from any other application.

- ☒ Yes
☐ No

Q260. Explanation (optional):



14. Other Forms

Q261. Sign the attached Charter School Required Signature Certification document and upload it as a PDF or image file.

☒ Upload Required File Type: pdf, image Max File Size: 30 Total Files Count: 1

Resources



Charter School Requ...

Applicant Evidence :



Q261 Charter School...

Uploaded on **4/23/2026**
by **Katie Brown**



15. Third-party Application Preparation

Q262. Was this application prepared with the assistance of a third-party person or group?

☒ Yes

☐ No

Q263. Give the name of the third-party person or group:

National Center for Montessori in the Public Sector (<http://public-montessori.org>)
(NCMPs)

Epic Change Education (ECE)

Q264. Fees provided to the third-party person or group:

None



16. Application Fee

Pursuant to G.S. 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 **April 24, 2026, at 5:00 pm EDT** for Fast Track and Accelerated applications, and **April 24, 2026, at 5:00 pm EDT** for traditional timeline applications. Payments will be accepted in the form of a certified check. Cash nor credit cards are accepted.

Q265.*Application Note: The applicant must mail the certified check or money order along with the Application Fee Payment Form (see the resources to download Payment Form) before or on the due date of April 26, 2026, at 5:00 pm EDT. By signing below you acknowledge and understand.

Payments should be made payable to the North Carolina Department of Public Instruction: North Carolina Department of Public Instruction Office of Charter Schools
6307 Mail Service Center Raleigh, NC 27699-6307

Signature

Resources



2026 Payment Form....



17. Signature page

Q266. Fill out the attached resource and get it signed and notarized. Then upload as a PDF or image file.

☒ Upload Required File Type: pdf, image Max File Size: 30 Total Files Count: 5

Resources



Signature Page.docx

Applicant Evidence :



Q266 Signature Page...

Uploaded on **4/22/2026**
by **Katie Brown**

Q267. Board chair, please digitally sign your application here.

Signature

Final Status



Approver Comments

DRAFT BYLAWS
of
Encompass Montessori

a Not-For-Profit Corporation

ARTICLE I
Company Formation

- 1.01. **FORMATION.** This Corporation is formed pursuant to the laws of the state of incorporation, North Carolina, as stated in the Articles of Incorporation for the Corporation.
- 1.02. **CORPORATE CHARTER COMPLIANCE.** The Board of Directors (the “Board”) acknowledges and agrees that they caused the Articles of Incorporation to be filed with the respective state office and all filing fees have been paid and satisfied.
- 1.03. **REGISTERED OFFICE & REGISTERED AGENT.** The registered office of the corporation shall be located within the state of incorporation and may be, but need not be, identical with the principal office. The address of the registered office may be changed from time to time. The Board is obligated to maintain and update the corporate records on file with the Corporation’s registered agent.
- 1.04. **OTHER OFFICES.** The Corporation may have other offices, either within or outside of its state of incorporation, as selected by the Board.
- 1.05. **CORPORATE SEAL.** The Board may adopt a corporate seal with the form and inscription of their choosing, however, the adoption and use of a corporate seal is not required.
- 1.06. **PURPOSE.** Consistent with the Articles of Incorporation, and until such time that the Articles of Incorporation have been amended, this Corporation is formed to engage in any lawful public tax-exempt not-for-profit business purpose.
- 1.07. **ADOPTION OF BYLAWS.** These corporate Bylaws have been adopted by the Board on behalf of the Corporation.

ARTICLE 2

Board of Directors

- 2.01. **INITIAL MEETING OF THE BOARD.** The Board has conducted and completed the initial meeting necessary to begin the business operations of the Corporation, including the adoption of these Bylaws. At the initial meeting of the Board, the initial directors were appointed to their respective staggered terms, and at least one director was appointed to an abbreviated term set to expire upon occurrence of the first annual meeting of the Board whereby that director can either be re-elected or replaced by the Board pursuant to these Bylaws.
- 2.02. **POWERS AND NUMBERS.** The management of all the Corporation's affairs, property, and interests shall be managed by or under the direction of the Board. Directors need not be members of the Corporation or residents of the state of incorporation to qualify and serve the Corporation as a director.
- Until these Bylaws are amended, the Board consists of at least five (5) directors who are elected for the term of three (3) years, and will hold office until their successors are duly elected and qualified at the following annual meeting of the Board. One of the initial directors shall serve an initial term of one (1) year, the second initial director shall serve an initial term of two (2) years, and the third initial director shall serve an initial term of the full three (3) years. Successor directors will be elected each year to replace or re-elect the incumbent director.
- 2.03. **DIRECTOR LIABILITY.** Each director is required, individually and collectively, to act in good faith, with reasonable and prudent care, and in the best interest of the Corporation. If a director acts in good faith and in a manner that is reasonably in line with the best interests of the Corporation as determined by a reasonably prudent person situated in similar circumstances, then they shall be immune from liability arising from official acts on behalf of the Corporation.
- Directors who fail to comply with this section of these Bylaws shall be personally liable to the Corporation for any improper acts and as otherwise described in these Bylaws.
- 2.04. **CLASSES OF DIRECTORS.** Until such time as these Bylaws are accordingly amended, the Corporation does not have classes of directors.
- 2.05. **CHANGE OF NUMBER.** The Board may increase or decrease the number of directors at any time by amendment of these Bylaws, pursuant to the process outlined in Article 8 of these Bylaws. A decrease in number does not have the effect of shortening the term of any incumbent director. If the established number of directors is decreased, the directors shall hold their positions until the next meeting of the Board occurs and new directors are elected and qualified. The Corporation must have at least five (5) directors.
- 2.06. **ELECTION OF DIRECTORS.** Directors are to be voted on and elected at each annual meeting of the Board, unless a special meeting is expressly called to remove a director

or fill a vacancy. If a director is elected, but is not yet qualified to hold office, then the previous director shall holdover until such time that the newly elected director is so qualified.

- 2.07. **REMOVAL OF DIRECTORS.** At any meeting of the Board called expressly for that purpose, any director, including the entire Board, may be removed by an affirmative majority vote by the current Board. If the Board votes to remove the entire Board, then the President, Treasurer, and Secretary will serve as the interim Board until directors are duly elected to the Board pursuant to these Bylaws. If the Corporation has members, then the members must promptly have a special meeting to elect directors to the Board. As soon as practical, the members or the interim Board must meet to elect directors via the process described in Section 2.02 of these Bylaws.
- 2.08. **VACANCIES.** All vacancies in the Board may be filled by the affirmative vote of a majority of the remaining directors, *provided* that any such director who fills a vacancy is qualified to be a director and shall only hold the office for the term specified in Section 2.02 of these Bylaws and until a new director is duly elected by the Board or members. Any vacancy to be filled due to an increase in the number of directors may be filled by the Board for a term lasting until the next annual election of directors by the Board at the annual meeting or a special meeting called for the purpose of electing directors. Any director elected to fill a vacancy which results from the removal of a director shall serve the remainder of the term of the removed director and until a successor is elected by the Board and qualified.
- Any individual who fills a vacancy on the Board shall not be considered unqualified or disqualified solely by virtue of being an interim director.
- 2.09. **OPEN MEETINGS.** All meetings of the Board shall comply with Article 33C of Chapter 143 of the North Carolina General Statutes. Consistent with that Article, the Board shall, among other things:
- (i) cause a current copy of the schedule of its regular meetings to be kept on file with the Secretary of the Foundation and
 - (ii) give public notice of regular, special, and emergency meetings pursuant to N.C. Gen. Stat. § 143-318.12.
- 2.10. **REGULAR MEETINGS.** The meetings of the Board or any committee may be held at the Corporation's principal office or at any other place designated by the Board or its committee, including by means of remote communication.
- 2.10. **SPECIAL MEETINGS.** Special meetings of the Board may be held at any place and at any time and may be called by the President, Vice President, Secretary, or Treasurer, or any director. Any special meeting of the Board must be preceded by at least forty-eight (48) hours' notice of the date, time, place, and purpose of the meeting, unless these Bylaws require otherwise.
- 2.11. **ACTION BY DIRECTORS WITHOUT A MEETING.** Any action which may be taken at a meeting of the Board (or its committee) may be taken without a meeting, *provided* all directors (or committee members) unanimously agree, and such unanimous consent is

included in the minutes of the proceeding, filed with the corporate books/records, and sets forth the action taken by the Board.

- 2.12. **NOTICE OF MEETINGS.** Regular meetings of the Board must be held with reasonable notice of the date, time, place, or purpose of the meeting. Notice may be given personally, by email, by facsimile, by mail, or in any other lawful manner, so long as the method for notice comports with Article 6 of these Bylaws. Oral notification is sufficient only if accompanied by a written record of the notice in the corporate books/records. Notice is effective at the earliest of:
- a. Receipt;
 - b. Delivery to the proper address or telephone number of the director(s) as shown in the Corporation's records; or
 - c. Five (5) days after its deposit in the United States mail, as evidenced by the postmark, if correctly addressed and mailed with first-class postage prepaid.
- 2.13. **QUORUM.** A simple majority of the current directors present prior to the start of a meeting constitutes a quorum, and a quorum is necessary at all meetings creating an action to transact business on behalf of the Corporation.
- 2.14. **MANNER OF ACTING.** Subject to the laws of the state of incorporation, as may be amended from time to time, the act of the majority of the directors present at a meeting at which a quorum is present when the vote is taken shall be the act of the Board unless the Articles of Incorporation require a greater percentage.
- 2.15. **WAIVER OF NOTICE.** A director waives the notice requirement if that director attends or participates in the meeting, *unless* a director attends the meeting for the express purpose of promptly objecting to the transaction of any business because the meeting was not lawfully called or convened. A director may waive notice by a signed writing, delivered to the Corporation for inclusion in the minutes, before or after the meeting.
- 2.16. **REGISTERING DISSENT.** A director who is present at a meeting at which an action on a corporate matter is taken is presumed to have assented to such action, unless the director expressly dissents to the action. A valid dissent must be entered in the meeting's minutes, filed with the meeting's acting Secretary before its adjournment, or forwarded by registered mail to the Corporation's Secretary within twenty-four (24) hours after the meeting's adjournment. These options for dissent do not apply to a director who voted in favor of the action or failed to express such dissent at the meeting.
- 2.17. **EXECUTIVE AND OTHER COMMITTEES.** The Board may create committees to delegate certain powers to act on behalf of the Board, *provided* the Board passes a resolution indicating such creation or delegation. The Board may delegate to a committee the power to appoint directors to fill vacancies on the Board. All committees must record regular minutes of their meetings and keep the minute book at the corporation's office. The creation or appointment of a committee does not relieve the Board or individual directors from their standard of care described in Section 2.03 of

these Bylaws.

- 2.18. **LOANS.** No loans may be made by the Corporation to any director.
- 2.19. **INDEMNIFICATION.** Provided the director complies with the standard of care described in Section 2.03 of these Bylaws, the Corporation shall indemnify any director made a party to a proceeding, brought or threatened, as a consequence of the director acting in their official capacity. In the event a director is entitled to indemnification by the Corporation, the director shall be indemnified or compensated for reasonable expenses incurred as a consequence of being connected to the Corporation and serving in good faith on its behalf.
- 2.20. **ACTION OF DIRECTORS BY COMMUNICATIONS EQUIPMENT.** Any action which may be taken at a meeting of the Board, or a committee, may be taken by means of a telephone or video conference or similar communications equipment which allows all persons participating in the meeting to hear each other at the same time. A director participating in a meeting by remote means is deemed to be present in person at the meeting.

ARTICLE 3

Members

- 3.01. **MEMBERSHIP.** Until such time that the Corporation's Articles of Incorporation or these Bylaws are amended, the Corporation has no members.

ARTICLE 4

Officers

- 4.01. **DESIGNATIONS.** The Corporation shall have at least five members, including a President, a Secretary, and a Treasurer, who will be elected by the Board. Per these Bylaws, an elected officer will hold office for one (1) year or until a successor is elected and qualified. The same person may hold any two or more offices concurrently, with exception to the offices of President, and Secretary which shall be held by separate individuals.
- 4.02. **REMOVAL AND RESIGNATION OF OFFICERS.** Any officer or agent may be removed by the Board at any time, with or without cause. Such removal shall be without prejudice to the contract rights, if any of the person so removed. Appointment of an officer or agent does not, by itself, create contract rights.

Any officer may resign at any time by giving written notice to the Board, the President,

or the Secretary. Any such resignation shall take effect upon receipt of such notice or at any later time specified therein, and unless otherwise specified in the notice, the acceptance of such resignation shall not be necessary to make it effective.

4.03. **THE PRESIDENT.** The President shall have general supervision of the Corporation's daily affairs and perform all other duties as are incident to the office or are properly required by a resolution passed by the Board.

4.04. **VICE PRESIDENT.** During the absence or disability of the President, the Executive Vice- President (if any) may exercise all functions of the President. Each Vice- President shall have such powers and fulfill such duties as may be assigned by a resolution of the Board.

4.05. **SECRETARY AND ASSISTANT SECRETARIES.** The Secretary must:

- a. Issue notices for all meetings and actions of the Board;
- b. Accept all requests for special meetings of the Board;
- c. Accept all notices of proxy appointments and revocations;
- d. Keep the minutes of all meetings;
- e. Accept delivery of any dissent announced at any meeting of the Board;
- f. Have charge of the corporate seal and books; and
- g. Make reports and perform duties as are incident to the office, or are properly required of him or her by the Board.

The Assistant Secretary, or Assistant Secretaries (in the order designated by the Board), shall perform all of the duties of the Secretary during the absence or disability of the Secretary, and at other times perform such duties as are directed by the Secretary, the President, or the Board.

4.06. **THE TREASURER.** The Treasurer shall:

- a. Have custody of all the Corporation's monies and securities and keep regular books of account;
- h. Disburse the Corporation's funds in payment of the just demands against the Corporation or as may be ordered by the Board, taking proper vouchers for such disbursements; and
- i. Provide the Board with an account of all his or her transactions as Treasurer and of the financial conditions of the office properly required of him or her by the Board.

The Assistant Treasurer, or Assistant Treasurers (in the order designated by the Board), shall perform all of the duties of the Treasurer in the absence or disability of the Treasurer, and at other times perform such duties as are directed by the Treasurer, the President, or the Board.

In the event of the absence or disability of the President and Vice President, then the Treasurer shall perform such duties of the President.

- 4.07. **DELEGATION.** In the absence or inability to act of any officer and of any person authorized to act in their place, the Board may delegate the officer's powers or duties to any other officer, director, or other person, subject to Section 4.01 of these Bylaws. Vacancies in any office arising from any cause may be filled by the Board, subject to Section 4.01 of these Bylaws, at any regular or special board meeting.
- 4.08. **OTHER OFFICERS.** The Board may appoint other officers and agents as they deem necessary or expedient. The term, powers, and duties of such officers will be determined by the Board and described in the resolution authorizing the appointment or designation.
- 4.09. **LIABILITY.** Each officer is required, individually and collectively, to act in good faith, with reasonable and prudent care, and in the best interest of the Corporation. If an officer acts in good faith and in a manner that is reasonably in line with the best interests of the Corporation as determined by a reasonably prudent person situated in similar circumstances, then they shall be immune from liability arising from official acts on behalf of the Corporation.
- Officers who fail to comply with this section of these Bylaws shall be personally liable to the Corporation for any improper acts and as otherwise described in these Bylaws.
- 4.10. **LOANS.** No loans may be made by the Corporation to any officer.
- 4.11. **BONDS.** The Board may resolve to require any officer to give bonds to the Corporation, with sufficient surety or sureties, conditioned upon the faithful performance of the duties of their offices and compliance with other conditions as required by the Board.
- 4.12. **SALARIES.** Officers' salaries will be fixed from time to time by the Board. Officers are not prevented from receiving a salary by reason of the fact that he or she is also a director of the Corporation.
- 4.13. **INDEMNIFICATION.** Officers shall be indemnified by the Corporation, so long as the officer acted in a manner substantially similar to and consistent with the standard of care required for directors, as described in Section 4.09 of these Bylaws. Any officer indemnification shall be limited to proceedings that are directly related to or have arisen out of the officer's acts on behalf of the Corporation.

ARTICLE 5

Books and Records

- 5.01. **MEETING MINUTES.** As required by these Bylaws, the Corporation must keep a complete and accurate accounting and minutes of the proceedings of the Board within the corporate books/records.
- 5.02. **RETENTION OF RECORDS.** The Corporation shall keep as permanent records all meeting minutes of the Board, all actions taken without a meeting by the Board, all actions taken by committee on behalf of the Board, and all waivers of notices of meetings.
- 5.03. **ACCOUNTING RECORDS.** The Corporation shall maintain appropriate accounting records.
- 5.04. **LEGIBILITY OF RECORDS.** Any books, records, and minutes may be in any form capable of being converted into written form within a reasonable time upon request.
- 5.05. **RIGHT TO INSPECT.** Any director or director representative has the right, upon written request delivered to the Corporation, to inspect and copy during usual business hours the following documents of the Corporation:
- a. Articles of Incorporation;
 - b. These Bylaws;
 - c. Minutes of the Board proceedings;
 - d. Annual statements of affairs; and
 - e. The other documents held at the principal address pursuant to these Bylaws.

The Corporation acknowledges and agrees that any obligation to produce corporate documents under this Article of these Bylaws shall attach to the Secretary as part of the duties described in Section 4.05 of these Bylaws.

ARTICLE 6

Notices

- 6.01. **MAILING OF NOTICE.** Except as may otherwise be required by law, any notice to any officer or director may be delivered personally or by mail. If mailed, the notice will be deemed to have been delivered on the close of business of the fifth business day following the day when deposited in the United States mail with postage prepaid and addressed to the recipient's last known address in the records of the Corporation.
- 6.02. **E-NOTICE PERMITTED.** Any communications required by the Act, these Bylaws, or any other laws may be made by digital or electronic transmission to the recipient's known electronic address or number as known to the Corporation at the time of notice.
- 6.03. **DUTY TO NOTIFY.** All directors, officers, employees, and representatives of the

Corporation are required to notify the Corporation of any changes to the individual's contact information. Pursuant to the obligations under this Section of these Bylaws, the individual must notify the Corporation that electronic transmissions of notice are impracticable, impossible, frustrated, or otherwise improper and ineffective.

ARTICLE 7

Special Corporate Acts

- 7.01. **EXECUTION OF WRITTEN INSTRUMENTS.** All contracts, deeds, documents, and instruments that acquire, transfer, exchange, sell, or dispose of any assets of the Corporation must be executed by the President to bind the Corporation. If the President is incapacitated or otherwise unavailable, then the designated Vice-President may execute the respective documents to bind the Corporation. This Section does not apply to any checks, money orders, notes, or other financial instruments for direct payment of corporate funds which are subject to Section 7.02 of these Bylaws.
- 7.02. **CONFLICT OF INTEREST.** Members of the Board of Directors occupy positions of fiduciary trust and are obligated to discharge their duties in good faith and with undivided loyalty to the School. They must act in the course of their duties solely in the School's best interests without regard to the interests of any other organization or person with which they are related or associated, must refrain from taking part in any transaction or exploiting any opportunity if they cannot act with undivided loyalty to the School, and must refrain from using information regarding the School's activities not generally known outside the School for their benefit. Directors are also subject to this policy while serving on a committee of the Board or while acting in any other capacity on behalf of the School.

Conflicts of interest ("Conflicts") are those circumstances in which the personal or business interests of a Members of the Board of Directors, or of an immediate family member, may actually or potentially conflict with the interests of the School, or may be perceived as actually or potentially conflicting with the interests of the School. Examples of Conflicts include:

- (i) engaging in, or seeking to engage in, any transaction with the School that involves the purchase, sale, or leasing of property, the granting or lending of money, or the provision of services,
- (ii) holding any ownership or management interest in any organization that provides property, goods, or services to the School, is a grantee of the School, or otherwise does, or seeks to do, business with the School,
- (iii) using information relating to the School's operations for personal or business advantage,
- (iv) disclosing confidential information of the School without authorization,
- (v) accepting a gift, entertainment, or other favor of more than nominal value from

any person or organization that has received or seeks to receive a grant from the School, does or seeks to furnish property, goods or services to the School, or otherwise transacts or seeks to transact business with the School, except entertainment received in the ordinary course of performing services for the School, (vi) exploiting any opportunity within the scope of the School's activities without first offering it to the School, and (vii) having any interest in any organization with a mission in direct conflict with the School's mission.

Members of the Board of Directors must disclose the material facts regarding any actual or potential Conflict on: Annual certifications submitted to the Board of Directors before each annual Board meeting. Each Member of the Board of Directors shall annually sign a statement which affirms such person has received a copy of the Conflict of Interest Policy, has read and understands the Policy, has agreed to comply with the Policy, and understands that the School is charitable and in order to maintain its federal tax exemption it must engage primarily in activities which accomplish one or more of its tax-exempt purposes.

Interim certifications submitted to the Board of Directors for actual or potential Conflicts that arise between annual certifications.

After full disclosure of the Conflict and all material facts, and after any discussion with the Member of the Board of Directors who has an actual or potential Conflict ("Interested Person"), the Board of Directors may determine that no actual Conflict exists and that no further action is required, based on any reasonable grounds, including the nominal nature of any interest involved. If an actual Conflict exists, neither the School nor the Interested Person shall enter into or continue the transaction or arrangement presenting the Conflict unless it is approved by the Board. In approving a Conflict, the Board shall consider whether a more favorable alternative transaction or arrangement is available with a party that does not present a Conflict. If a more advantageous transaction or arrangement is not reasonably possible under circumstances not producing a Conflict, the Board shall determine by a majority vote of the disinterested Directors whether to approve a Conflict by considering whether such Conflict is in the School's best interest and whether it is fair and reasonable.

Any Interested Person seeking the approval of a Conflict or a determination that no actual Conflict exists shall abstain from the consideration of, and voting on, the transaction, arrangement, or opportunity presented to the Board, except to disclose the transaction, arrangement, or opportunity and answer questions about it. Any Director so abstaining may be counted in determining the presence of a quorum.

- 7.03. **SIGNING OF CHECKS OR NOTES.** All authorizations to distribute, pay, or immediately draw upon the financial resources of the Corporation must be signed by the Treasurer, including any expense reimbursement or compensation payments to

directors, officers, employees, representatives, service providers, or contractors of the Company. If the Treasurer is incapacitated or otherwise unavailable, then the President may execute the respective documents to bind the Corporation.

- 7.04. **SPECIAL SIGNING POWERS.** If the President holds an interest which exists outside of the capacity of being President, then any agreement involving such interest must be signed by a separate individual officer to duly bind the Corporation to such an agreement or instrument.
- 7.05. **MERGERS.** Following the approval by the Board, in order for any consolidation or merger to be effective, it must follow the process set out under the laws of the state of incorporation. Any merger which would result in the loss of the Corporation's not-for-profit or tax-exempt status is not permitted under these Bylaws.
- 7.06. **CONVERSIONS.** Following the approval by the Board, in order for any conversion of the Corporation to another organizational structure to be effective, it must follow the processes set out under the laws of the state of incorporation. Any conversion which would result in the loss of the Corporation's not-for-profit or tax-exempt status is not permitted under these Bylaws.
- 7.07. **DISSOLUTION.** Following the approval by the Board, in order for the Corporation to be dissolved, it must follow the process set out under the laws of the state of incorporation.
- 7.08. **DISTRIBUTION OF ASSETS.** Upon the dissolution of the organization, assets shall be distributed for one or more exempt purposes within the meaning of section 501(c)(3) of the Internal Revenue Code, or corresponding section of any future federal tax code, or shall be distributed to the federal government, or to a state or local government, for the public purpose. Any such assets not disposed of shall be disposed of by the District Court of the county in which the principal office of the organization is then located, as said court shall determine.

ARTICLE 8

Amendments

- 8.01. **BY DIRECTORS.** The Board has the power to make, alter, amend, and repeal the Corporation's Bylaws. Any alteration, amendment, or repeal of the Bylaws, shall be effective following a majority vote of the Board.
- 8.02. **EMERGENCY BYLAWS.** The Board may adopt emergency Bylaws which operate during any emergency in the Corporation's conduct of business resulting from an attack on the United States, a nuclear or atomic disaster, or another force majeure incident.
- 8.03. **COMPLIANCE WITH STATE LAW.** Any amendment to the Corporation's Articles of Incorporation or these Bylaws shall comply with the respective laws, rules, and regulations of the jurisdictions in which the Corporation operates or conducts business.

These Bylaws are adopted by resolution of the Corporation's Board of Directors on this 22nd day of May, 2026.

Kati Born

Director

Kelly Z. Ford

Director

Alexis S. Wehring

Director

State of North Carolina
Department of the Secretary of State

ARTICLES OF INCORPORATION
NONPROFIT CORPORATION

Pursuant to §55A-2-02 of the General Statutes of North Carolina, the undersigned corporation does hereby submit these Articles of Incorporation for the purpose of forming a nonprofit corporation.

1. The name of the nonprofit corporation is: Encompass Montessori.

2. ☒ (Check only if applicable.) The corporation is a charitable or religious corporation as defined in NCGS §55A-1-40(4).

3. The name of the initial registered agent is: Northwest Registered Agent Service, Inc..

4. The street address and county of the initial registered agent's office of the corporation is:

Number and Street: 4030 Wake Forest Road STE 349

City: Raleigh State: NC Zip Code: 27609 County: Wake

The mailing address *if different from the street address* of the initial registered agent's office is:

Number and Street or PO Box: _____

City: _____ State: NC Zip Code: _____ County: _____

5. The name and address of each incorporator is as follows:

Name	Address
<u>Sara Suchman</u>	<u>4030 Wake Forest Road STE 349 Raleigh NC 27609</u>
_____	_____
_____	_____

6. (Check either "a" or "b" below.)

a. ☐ The corporation will have members.

b. ☒ The corporation will not have members.

7. Attached are provisions regarding the distribution of the corporation's assets upon its dissolution.

8. Any other provisions which the corporation elects to include are attached.

9. The street address and county of the principal office of the corporation is:

Principal Office Telephone Number: 919-439-0907

Number and Street: 4030 Wake Forest Road STE 349

City: Raleigh State: NC Zip Code: 27609 County: _____

The mailing address *if different from the street address* of the principal office is:

Number and Street or PO Box: 4030 Wake Forest Road STE 349

City: Raleigh State: NC Zip Code: 27609 County: _____

10. **(Optional):** Listing of Officers (See instructions for why this is important)

Name	Address	Title
Candace Fletcher	4030 Wake Forest Road STE 349 Raleigh NC 27609	President
Sara Suchman	4030 Wake Forest Road STE 349 Raleigh NC 27609	Vice President
Carol Pirrello	4030 Wake Forest Road STE 349 Raleigh NC 27609	Secretary
Katie Brown	4030 Wake Forest Road STE 349 Raleigh NC 27609	Treasurer

11. **(Optional):** Please provide a business e-mail address:

Privacy Redaction

The Secretary of State's Office will e-mail the business automatically at the address provided at no charge when a document is filed. The e-mail provided will not be viewable on the website. For more information on why this service is being offered, please see the instructions for this document.

12. These articles will be effective upon filing, unless a future time and/or date is specified: _____

This is the 22 day of April, 2025.

Encompass Montessori

Incorporator Business Entity Name



Signature of Incorporator

Sara Suchman, Incorporator

Type or print Incorporator's name and title, if any

NOTES:

1. Filing fee is \$60. This document must be filed with the Secretary of State.

Purpose of Corporation

This corporation is organized for the following purpose(s) (*check as applicable*):

- ☐ religious,
- ☐ charitable,
- ☒ educational,
- ☐ testing for public safety,
- ☐ scientific,
- ☐ literary,
- ☐ fostering national or international amateur sports competition, and/or
- ☐ prevention of cruelty to children or animals,

including, for such purposes, the making of distributions to organizations that qualify as exempt organizations under Sections 501(c)(3) and 170(c)(2) of the Internal Revenue Code of 1986 (herein the "Code") (or the corresponding provisions of any future United States Internal Revenue Code).

Prohibited Activities

No part of the net earnings of the corporation shall inure to the benefit of or be distributable to, its members, directors, officers, or other private persons except that the corporation shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of purposes set forth in these articles of incorporation. No substantial part of the activities of the corporation shall be the carrying on of propaganda or otherwise attempting to influence legislation, and the corporation shall not participate in or intervene in (including the publishing or distribution of statements) any political campaign on behalf of or in opposition to any candidate for public office. Notwithstanding any other provisions of these articles, the corporation shall not carry on any other activities not permitted to be carried on (a) by a corporation exempt from federal income tax under Section 501(c)(3) of the Code or (b) by a corporation, contributions to which are deductible under Section 170(c)(2) of the Code.

Distributions Upon Dissolution

Upon the dissolution of the corporation, the Board of Directors shall, after paying or making provision for the payment of all of the liabilities of the corporation, dispose of all of the assets of the corporation exclusively for the purposes of the corporation in such manner, or to such organization or organizations organized and operated exclusively for religious, charitable, educational, scientific or literary purposes as shall at the time qualify as an exempt organization or organizations under Section 501(c)(3) of the Code as the Board of Directors shall determine, or to federal, state, or local governments to be used exclusively for public purposes. Any such assets not so disposed of shall be disposed of by the Superior Court of the county in which the principal office of the corporation is then located, exclusively for such purposes or to such organizations, such as the court shall determine, which are organized and operated exclusively for such purposes, or to such governments for such purposes.



Department of the Treasury
Internal Revenue Service
Tax Exempt and Government Entities
P.O. Box 2508
Cincinnati, OH 45201

ENCOMPASS MONTESSORI
4030 WAKE FOREST ROAD STE 349
RALEIGH, NC 27609

Date:
09/08/2025
Employer ID number:
39-2138186
Person to contact:
Name: S. Camille
ID number: 4279166
Telephone: 877-829-5500
Accounting period ending:
December 31
Public charity status:
170(b)(1)(A)(ii)
Form 990 / 990-EZ / 990-N required:
Yes
Effective date of exemption:
April 29, 2025
Contribution deductibility:
Yes
Addendum applies:
No
DLN:
26053542005955

Dear Applicant:

We're pleased to tell you we determined you're exempt from federal income tax under Internal Revenue Code (IRC) Section 501(c)(3). Donors can deduct contributions they make to you under IRC Section 170. You're also qualified to receive tax deductible bequests, devises, transfers or gifts under Section 2055, 2106, or 2522. This letter could help resolve questions on your exempt status. Please keep it for your records.

Organizations exempt under IRC Section 501(c)(3) are further classified as either public charities or private foundations. We determined you're a public charity under the IRC Section listed at the top of this letter.

Information for Charter Schools

You're not subject to the specific publishing requirements of Revenue Procedure 75-50, 1975-2 C.B., page 587, as long as you operate under a contract with the local government. If your method of operation changes to the extent that your charter is not approved, terminated, cancelled or not renewed, you should notify us. You'll also be required to comply with Revenue Procedure 75-50.

If we indicated at the top of this letter that you're required to file Form 990/990-EZ/990-N, our records show you're required to file an annual information return (Form 990 or Form 990-EZ) or electronic notice (Form 990-N, the e-Postcard). If you don't file a required return or notice for three consecutive years, your exempt status will be automatically revoked.

If we indicated at the top of this letter that an addendum applies, the enclosed addendum is an integral part of this letter.

For important information about your responsibilities as a tax-exempt organization, go to www.irs.gov/charities. Enter "4221-PC" in the search bar to view Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, which describes your recordkeeping, reporting, and disclosure requirements.

Sincerely,

A handwritten signature in dark ink that reads "Stephen A. Martin". The signature is written in a cursive style with a large initial 'S' and 'M'.

Stephen A. Martin
Director, Exempt Organizations
Rulings and Agreements

<u>Board Member Name</u>	<u>Board Title</u>	<u>Phone Number</u>	<u>Email Address</u>	<u>County of Residence</u>	<u>Current Occupation</u>	<u>Past or Present Professional Licenses Held</u>	<u>Any disciplinary action taken against any of these professional licenses?</u>
Katie Brown	President	949-400-6175	encompass@public-n	Wake	Teacher educator	CA, SC, & NC secondary teaching license	None
Karyn Farmer	VP	240-779-1346	karyn8910@gmail.co	Nash	NonProfit Founder/Exec	NA	NA
Rachael Shaw Marshall	Secretary	770-865-4344	secretarync@encom	Haywood	Education Administrator	NA	NA
Alexis Weddings	Treasurer	919-710-2713	aweddings.encompas	Wake	Accountant	NA	NA
Kelly Bradford	Member at La	919-880-3975	info@encompassmor	Franklin	Graduate Research/Teachin	NC teaching License	None

#VALUE!

Enrollment Demographics Table

Ethnicity/Race	# of Students	Percentage (%)
American Indian or Alaska Native	0	0%
Asian	34	4%
Black or African American	320	37%
Hispanic	155	18%
Native HI or Pacific Islander	0	0%
Two or More Races	35	4%
White	320	37%
Total number of students:	864	
EDS Subgroups		
Economically Disadvantaged Students	363	42%
Students with Disabilities	112	13%
English Language Learners	147	17%
Students Experiencing Homelessness	32	4%
Total number of EDS subgroup	654	76%

#VALUE!

Enrollment Summary Table

Academic School Year	Grade Levels	Total Projected Student Enrollment
Year 1	Kindergarten, 1st	144
Year 2	Kindergarten, 1st, 2nd	240
Year 3	Kindergarten, 1st, 2nd, 3rd	336
Year 4	Kindergarten, 1st, 2nd, 3rd, 4th	432
Year 5	Kindergarten, 1st, 2nd, 3rd, 4th, 5th	528

Academic

Grade Levels

Total Projected

Year 1

Year 2

Year 3

Year 4

Year 5



ENCOMPASS MONTESSORI: ENROLLMENT

	<u>2028</u>	<u>2029</u>	<u>2030</u>	<u>2031</u>	<u>2032</u>	<u>2033</u>	<u>2034</u>	<u>2035</u>	<u>2036</u>	<u>2037</u>
K	72	96	96	96	96	96	96	96	96	96
1	72	72	96	96	96	96	96	96	96	96
2		72	72	96	96	96	96	96	96	96
3			72	72	96	96	96	96	96	96
4				72	72	96	96	96	96	96
5					72	72	96	96	96	96
6						72	72	96	96	96
7							72	72	96	96
8								72	72	96
Total	144	240	336	432	528	624	720	816	840	864

Dates	Event	Time	Address
5/1/2026	Movie in the Park	8:15-10:15pm	810 N First Avenue Knightdale
5/16/2026	Pickin ' in the Park	4-7pm	810 N First Avenue Knightdale
5/21/2026	Harper Hour	5:30-7:30pm	207 Main Street Knightdale
6/27/2026	Splash Pad Bash	11am-1pm	810 N First Avenue Knightdale
7/25/2026	Splash Pad Bash	11am-1pm	810 N First Avenue Knightdale
8/15/2026	Arts & Education Festival	10am-1pm	810 N First Avenue Knightdale
8/29/2026	Splash Pad Bash	11am-1pm	810 N First Avenue Knightdale
10/3/2026	Fall on First Avenue	11am-2pm	810 N First Avenue Knightdale
10/15/2026	Harper Hour	5:30-7:30pm	207 Main Street Knightdale
10/30/2026	Kick or Treat the Trail	6-8pm	810 N First Avenue Knightdale
12/4/2026	Christmas Tree Lighting	6-8pm	810 N First Avenue Knightdale

Dates	Event	Time	Address
4/17/2026	Meet on Main	6-10pm	Downtown Wendell
5/28/2026	Meet on Main	6-10pm	Downtown Wendell
6/18/2026	Meet on Main	6-10pm	Downtown Wendell
7/16/2026	Meet on Main	6-10pm	Downtown Wendell
10/3/2026	Wendell Harvest Festival	9am-10pm	Downtown Wendell

Dates	Event	Time	Address
4/25/2026	Spring Fest	4-8pm	Downtown Zebulon
8/14/2026	Rock the Block	6-9pm	Downtown Zebulon
9/11/2026	Rock the Block w/ Latin Music Focus	6-9pm	Downtown Zebulon
10/9/2026	Rock the Block Faith and Blue	6-9pm	Downtown Zebulon
10/23/2026	Spooky Family Fun Night	5:30-7:30pm	301 S Arendell Avenue Zebulon
11/21/2026	Candy Cane Lane & Tree Lighting	4-8pm	109 S Arendell Avenue Zebulon

Dates	Event	Time	Address
5/8/2026	Downtown Concert	6-9pm	100 W Main Street Clayton
5/17/2026	Too Much Sylvia Concert	4-7pm	67 Crossroads Way Clayton
6/6/2026	Square to Square Street Festival		Main Street Clayton
6/11/2026	Downtown Concert	6-9pm	100 W Main Street Clayton
7/17/2026	Downtown Concert	6-9pm	100 W Main Street Clayton
8/13/2026	Downtown Concert	6-9pm	100 W Main Street Clayton
9/11/2026	Downtown Concert	6-9pm	100 W Main Street Clayton
9/13/2026	The Embers	4-7pm	67 Crossroads Way Clayton
10/24/2026	Harvest Festival	8am-until	Main Street Clayton
12/3/2026	Christmas Village and Tree Lighting	5-8am	Clayton Town Square-Main Street

Dates	Event	Time	Address
10/10/2026	Fall Vendor Event	10am	15 Spencers Gate Dr Youngsville, NC 27596
4/10/2027	STEM Saturday	TBA	Wake Forest

Insights

[See all](#)

Last 28 days

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141 ↑100%

Engagement



63 ↑6K%

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Mar 26 - Apr 22

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Viewers

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Mar 26 - Apr 22



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141 Engagement ⓘ

↑100% from previous 14 days





epicchangeeducation.org
sherilyn@epicchangeeducation.org

April 20, 2026

North Carolina Charter Schools Review Board
301 N Wilmington Street
Raleigh, NC 27601-2825

Dear Review Board Members,

Epic Change Education is a non-profit organization dedicated to incubating, developing, replicating, and supporting innovative, engaging, and empowering schools. We have been proud to support Encompass Montessori's founding Board of Directors with enthusiastic encouragement and promotional support.

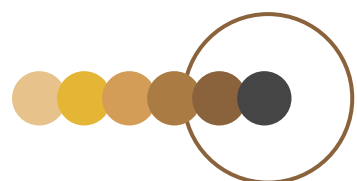
Public Montessori serves the whole child and creates a supportive community experience for families, and the Wake County community has warmly received the proposed school. The team has deep connections within the community and a wealth of experience with Montessori and Montessori charter schools.

We will be available to provide additional grant-funded strategic marketing support alongside our Owner's Representative services to help Encompass Montessori secure a facility, alongside experienced non-profit charter school facilities developer 22 Beacon and local North Carolina General Contractor Hubrich Contracting.

Our organizations are coming together in support of Encompass Montessori because we believe the school will make epic change in the lives of the children it serves.

Best,

Sherilyn Moore
CEO, Epic Change Education





Alexis Weddings <alexis.weddings@aswfinancialservices.com>

Support for Charter School Application

5 messages

Stephen Morgan <stephen.morgan@knightdalenc.gov>

To: Alexis Weddings <alexis.weddings@aswfinancialservices.com>

Tue, Mar 3, 2026 at 5:57 PM

Dear Ms. Weddings,

Please find this email as an endorsement of my support for your application to bring Encompass Montessori, a public charter school, to the Knightdale area. As you are aware, Knightdale is a fast-growing municipality in eastern Wake County. As Wake County adds approximately 60 new residents per day, Knightdale and the surrounding area gain several people every week. With the growth we are experiencing, it is no surprise that additional schools will be required. We are a diverse population with a strong sense of community, and a well educated population is important to all of us.

Knowing that you are proposing a public charter is important. I believe our community is stronger when all children have equal opportunity to attend and excel at any school. Also important to me is ensuring children will be properly fed and have proper transportation to ensure no child is excluded from basic needs to attend school. These items have been addressed in your application, and that gives me assurance that this school will be successful in providing great opportunities for all children, regardless of social status. Also, the Montessori learning system will be a great addition to the traditional public school model. Having this option could be extremely beneficial for children that would be better suited to this learning environment.

I wish you well as you pursue this opportunity.

With kind regards,
Stephen

Stephen Morgan
Councilor

stephen.morgan@knightdalenc.gov
919-961-0887

3/4/26, 6:12 PM

aswfinancialservices.com Mail - Support for Charter School Application



Town of Knightdale | KnightdaleNC.gov
950 Steeple Square Ct. | Knightdale, NC 27545 | 919-217-2200



This message and any attachments may be considered public record
and are subject to public review.

April 19, 2026

Katie Brown
President of the Board
Encompass Montessori North Carolina
4030 Wake Forest Road, Suite 349
Raleigh, NC 27609
via Email: katie.brown@public-montessori.org

To Whom It May Concern:

This letter is in support for Encompass Montessori North Carolina's ("EMNC") charter application to the North Carolina Department of Public Instruction ("NCDPI") to operate a public charter school in Wake County, North Carolina.

22Beacon, Inc. ("22Beacon") is the nation's largest nonprofit developer and Community Development Financial Institution ("CDFI") dedicated exclusively to addressing the financing and facility needs of charter schools. Through its "lease-to-own" model, 22Beacon enables school leaders to remain focused on their educational mission while the organization manages the financing, design, and construction of facilities tailored to each school's instructional model, student population, and budget.

In addition, 22Beacon's direct lending program supports acquisition, site development, construction financing, leasehold improvements, and mini-permanent loans, with a primary focus on facilities located in underserved communities where access to high-quality educational options is most needed. Further information is available at www.22Beacon.org.

Since its inception, 22Beacon has provided more than \$85 million in funding to 223 schools across 32 states and the District of Columbia. This work has helped create over 100,000 student seats, 71% serving low-income communities, while leveraging more than \$1 billion in private capital financing and lease commitments to deliver over 8.5 million square feet of safe, modern, and efficient educational facilities.

22Beacon looks forward to supporting EMNC in meeting its long- and short-term facility and financing needs. We respectfully urge approval of the application to establish a new Montessori public charter school in North Carolina, expanding access to high-quality, student-centered education and creating meaningful opportunities for children and families through an innovative, transformative school model.

Sincerely,



Rebecca Salvo
Senior Vice President

Zebulon Chamber of Commerce Young Professionals

April 15, 2026

To Whom It May Concern,

On behalf of the Zebulon Chamber of Commerce Young Professionals, I am proud to offer our support for the proposed Encompass Montessori Charter School, planned to open in Eastern Wake County in August 2028.

Our group is dedicated to building strong community connections through volunteerism, local events, and partnerships that support growth and opportunity. We believe that schools are a vital part of a thriving community, and we are excited about the positive impact this school could bring to families in our area.

We would welcome the opportunity to collaborate with Encompass Montessori Charter School on community events, outreach efforts, and future partnerships. We are always eager to support local schools and look forward to working together to make a meaningful impact.

Thank you for your consideration.

Sincerely,

Ruby Helms

Zebulon Chamber of Commerce Young Professionals

ruby.rentparrish@gmail.com



26 March 2026

Attn: Katie Brown, President
Encompass Montessori
4030 Wake Forest Road, Suite 349
Raleigh, NC 27609

Re: Letter of Support – Hubrich Contracting, Inc. as General Contractor

Dear Ms. Brown,

On behalf of Hubrich Contracting, Inc., we are pleased to provide this letter of support for Encompass Montessori's proposed charter school in North Carolina. Hubrich is honored to be considered as the General Contractor for this important project and is committed to supporting the successful development and delivery of a high-quality educational facility.

Hubrich Contracting is a licensed General Contractor with nearly two decades of experience specializing in K–12 and charter school construction. Since our founding in 2005, we have successfully delivered over 54 charter school projects, with a strong emphasis on Design-Build delivery, adaptive reuse, and fast-tracked campus development. Our team understands the unique needs of charter schools, including budget constraints, accelerated schedules, and the importance of creating safe, durable, and student-centered learning environments.

We are prepared to partner closely with Encompass Montessori and its development team to provide comprehensive preconstruction and construction services, including cost modeling, constructability review, scheduling, and project execution. Our goal is to ensure that the facility is delivered on time, within budget, and aligned with the school's educational vision.

Hubrich Contracting is excited about the opportunity to support Encompass Montessori and help bring this project to life. We are confident in our ability to deliver a high-quality facility that will serve students, educators, and the surrounding community for years to come.

Please feel free to contact us if additional information is needed.

Sincerely,

Steve Hubrich

Steve Hubrich
President
steve@hubrichcontracting.com



Ro Adoki

Agent

106 N Arendell Avenue
Zebulon, NC 27597-2602
Bus: 919-887-2047

To Whom It May Concern,

I am writing to express my strong support for establishing a Montessori charter school in the Eastern Wake County area. As a local business owner and a parent of four children, I have witnessed firsthand the profound and lasting benefits of Montessori education, and I believe that bringing such an opportunity closer to home would greatly benefit our community and its future.

My two older children attended a Montessori charter school from kindergarten through eighth grade. They are now thriving in high school, excelling academically and socially—an outcome I attribute in large part to their Montessori foundation. My two youngest children are currently enrolled in the Montessori charter program in Wake Forest, where they continue to flourish, demonstrating enthusiasm for learning, independence, and critical thinking skills.

Montessori education offers a unique approach that differs significantly from traditional learning methods. It emphasizes individualized learning, hands-on experiences, and fostering a child's natural curiosity and love for learning. Students develop self-discipline, creativity, problem-solving abilities, and social skills within a nurturing environment that respects their developmental pace.

As a local business owner, I recognize the importance of investing in the future of our community. Having a Montessori charter school in Eastern Wake County would provide families with access to an educational model that nurtures well-rounded, confident, and capable students. This would not only enhance academic achievement but also contribute to the growth of responsible and engaged members of our community—future leaders and innovators who will strengthen our local economy and society.

I sincerely hope that the possibility of opening a Montessori charter school in our area is seriously considered, as it would be a tremendous asset for our children's education and their future success.

Thank you for your time and consideration.

Sincerely,

The greatest compliment you can give is a referral.



February 25, 2026

North Carolina Charter Schools Review Board
c/o North Carolina Department of Public Instruction
6301 Mail Service Center
Raleigh, NC 27699-6301

Re: Letter of Support for Encompass Montessori Charter School

Dear Members of the Review Board,

On behalf of the Zebulon Chamber of Commerce, I am pleased to offer this letter of support for the proposed Encompass Montessori Charter School, which seeks to serve families in Eastern Wake County.

Eastern Wake County continues to experience steady residential and commercial growth. As our business community expands, so does the need for diverse, high-quality public education options that support working families and contribute to long-term economic vitality. The Chamber recognizes that strong schools are foundational to a strong local economy.

Encompass Montessori Charter School proposes to offer a public Montessori education model that emphasizes hands-on learning, student independence, critical thinking, and whole-child development. This educational approach provides families with an additional public school option that meets the needs of students with diverse learning styles while preparing them to become capable, engaged members of the workforce and community.

Expanding school choice in Eastern Wake County supports workforce recruitment and retention, strengthens community stability, and enhances the overall attractiveness of our region for new and existing businesses. Providing families with access to innovative, high-quality public education options is an important component of sustaining economic growth in our area.

The Zebulon Chamber of Commerce supports the concept of Encompass Montessori Charter School and its efforts to broaden educational opportunities for families in our community. We appreciate the thoughtful planning and commitment demonstrated by the founding team and believe this school would be a valuable addition to the educational landscape of Eastern Wake County.

Thank you for your consideration of this proposal.

Sincerely,

A handwritten signature in blue ink that reads 'John R. Saffold'.

Executive Director
Zebulon Chamber of Commerce

Encompass Montessori Continuum - Kindergarten Lesson Sequences

Practical Life (Including Art and Movement)				
Foundations				
	Preliminary Exercises	Skills Inventory: Demonstrates fine motor control and coordination through use of Montessori Materials and tools for pouring, carrying, transferring, polishing, opening, shutting, folding, and cutting.		
		Exercises for Using Water		
			Filling a Pitcher	
			Pouring Water	
			Two Glasses	
			Cup and Saucer	
			Carrying a Container of Water	
		Preparations for Using Water		
			Using a Sponge	
			Operating a Faucet	
			Pouring Rice	
		Exercises for Carrying		
			Carrying a Chair	
			Carrying a Table	
			Carrying A Tray	
			Carrying a Book	
			Handling a Book	
			Carrying Materials	
			How to Carry, Roll and Unroll a Mat	
			Carrying and Offering Scissors	
			Carrying a Tray Around a Rug	
		Exercises for Transfer		
			Grasping	
			Spooning	
			Baster	
			Tongs	
		Exercises for Polishing		
			Operating a Dropper	
			Making a Cloth Finger Pouch	
		Exercises in Opening and Shutting		
			Doors and Windows	

Encompass Montessori Continuum - Kindergarten Lesson Sequences

			Boxes	
			Bottles and Jars	
		Exercises in Folding		
			Dusters	
			Towels	
			Aprons	
			Napkins	
		Exercises in Cutting		
			Knives with Rounded Points	
			Scissors and Paper	
Practical Life Activities				
	Control and Coordination of Movement	Skills Inventory: Demonstrates gross-motor control through balance in large-muscle movement and awareness of one's own body and other people's space during interactions.		
		Walking Around a Rug		
		Walking on a Line		
			Rhythm	
			Equilibrium	
		Gross Motor Lessons		
			Animal Movements	
			Feelings Movements	
			Freeze Dance	
			Scarf Dance	
			Ball Toss	
			Obstacle Course	
			Using Equipment	
		Silence Game		
	Care of Self	Skills Inventory: Participates in personal self-care skills including, dressing and undressing, handwashing, care of clothing, food preparation and personal appearance.		
		Dressing and Undressing		
			Dressing Frames	
				Snap frame
				Velcro Frame
				Large button frame
				Buckle frame

Encompass Montessori Continuum - Kindergarten Lesson Sequences

				Zipper frame
				Bow-tying frame
				Shoelace frame
				Safety Pin Frame
			Garments	
		Using an Apron		
		Handwashing		
		Using Clothespins		
		Hanging Up Clothes		
		Checking Overall Appearance		
		Preparing Food		
			Orange Squeezing	
			Spreading	
			Apple Slicing	
			Carrot Peeling and Slicing	
			Making tea	
			Slicing a Banana	
	Care of the Environment	Skills Inventory: Participates in care of the indoor and outdoor environments including dusting, washing, mopping, sweeping, racking, caring for plants etc.		
		Indoor Environment		
			Dusting	
			Washing A Table	
			Sweeping	
			Floor Cleaning (sponging up spills and mopping)	
			Care of Plants	
			Washing the Leaves of a Plant	
			Arranging Flowers	
			Hanging to Dry	
			Washing Cloths	
			Setting a Table	
			Clearing a Table	
			Crumbing a Table	
			Dishwashing	
			Window Washing	

Encompass Montessori Continuum - Kindergarten Lesson Sequences

			Chalkboard Washing	
			Sewing a Button	
			Polishing	
				Wood Polishing
				Metal Polishing
		Outdoor Environment		
			Sweeping Steps	
			Picking Up Debris	
			Raking Leaves	
			Planting Flowers or Vegetables	
	Grace and Courtesy	Skills Inventory: Demonstrates orientation to the social environment through the use of vocabulary and movements that show awareness of and responsiveness to people and the environment.		
		Grace and Courtesy		
			Blowing one's nose	
			Covering one's mouth for a sneeze or cough	
			How to yawn	
			Opening a door to receive someone and inviting them to	
			Making introductions	
			Greeting a guest	
			Shaking hands	
			How to talk softly but audibly	
			Offering an object to someone	
			Passing an object from one person to another	
			How to ask for something	
			How to accept	
			How to refuse	
			Thanking someone	
			Accepting thanks	
			Excusing yourself	
			How to apologize	
			Passing behind so as not to disturb others	
			How and when to interrupt	
			Standing	

Encompass Montessori Continuum - Kindergarten Lesson Sequences

			Sitting down - Getting up	
			Joining a group	
			Observing work	
			Where to put a rug	
	Art Skills	Skills Inventory: Demonstrates hand-eye coordination and fine motor control by using a pincer grip to hold and manipulate tools for drawing, painting, modeling, punching, and cutting.		
		Art Skills		
			Pushpin	
			Pencil Sharpening	
			Collage: Gluing Paper	
			Collage: Mixed Media	
			Playdough	
			Painting with a Brush	
			Stringing Large Beads	
Sensorial (Including Music)				
Education of the Senses				
	Tactile Sense	Skills Inventory: Demonstrates refinement and understanding of concepts of touch (texture, temperature, weight) through ordering, pairing, comparing, and vocabulary.		
		Rough and Smooth Boards		
			One	
			Two	
			Three	
		Touch Tablets		
			Pairing	
			Grading	
		Fabric Matching		
			Fabric Box 1	
			Fabric Box 2	
		Thermic Bottles		
			Pairing	
			Grading	
		Thermic Tablets		
		Baric Tablets		
	Visual Sense	Skills Inventory: Demonstrates refinement and understanding of visual concepts (dimension, size, thickness, length, color, shape) through ordering, pairing, comparing, and vocabulary.		

Encompass Montessori Continuum - Kindergarten Lesson Sequences

		Cylinder Blocks		
			One at a Time	
			Two at a Time	
			All Four Blocks	
			Three at a Time	
			Distance Games	
		The Pink Tower		
			Introduction	
			Unit of Measure	
		The Brown Stairs		
			Introduction	
			Distance Game	
			Unit of Measure	
		The Red Rods		
			Introduction	
			Distance Game	
			Unit of Measure	
		The Roman Arch		
		The Color Tablets		
			Distance Game	
			One	
			Two	
			Three	
		The Geometry Cabinet		
			Distance Game	
			Introducing the Contrasts	
			One Drawer	
			Card Activities	
	Stereognostic Sense	Skills Inventory: Demonstrates refinement and understanding of stereognostic concepts through ordering, pairing, comparing, and vocabulary.		
		Geometric Solids		
			Introduction	
			Stereognostic Game	

Encompass Montessori Continuum - Kindergarten Lesson Sequences

			Solids and Bases	
		Building Shapes		
		Sorting		
			One	
			Two	
			Three	
		Mystery Bag		
	Auditory Sense	Skills Inventory: Demonstrates refinement and understanding of auditory concepts (volume, timbre, pitch) through ordering, pairing, comparing, and vocabulary.		
		Sound Boxes		
			Pairing	
			Grading	
		Timbre Game		
		Bells		
			Listening to One Bell	
			Pairing the Diatonic Scale	
			Grading the Diatonic Scale	
			Naming Diatonic Pitches	
			Pentatonic Scale	
			Chromatic Scale	
		Sharing Music		
			Enjoyment of Music	
			Musical Instruments	
			Music and Movement	
	Olfactory Sense	Skills Inventory: Demonstrates refinement and understanding of olfactory concepts through ordering, pairing, comparing, and vocabulary.		
		Smelling Bottles		
			Pairing	
			Ordering by Preference	
	Gustatory Sense	Skills Inventory: Demonstrates refinement and understanding of gustatory concepts through ordering, pairing, comparing, and vocabulary.		
		Tasting Jars		
			Pairing	
			Ordering by Preference	

Encompass Montessori Continuum - Kindergarten Lesson Sequences

	Mixed Impressions	Skills Inventory: Demonstrates refinement and understanding of concepts of geometry (two-dimensional and three-dimensional shapes and objects) through ordering, pairing, comparing, building, and vocabulary regardless of size and orientation.		
		Constructive Triangles		
			Introduction	
			Rectangle Box	
			Blue Triangle Box	
			Triangular Box	
			Small Hexagonal Box	
			Large Hexagonal Box	
		Knobless Cylinders		
			One Box	
			Two Boxes Together	
			Three Boxes Together	
			Four Boxes Together	
		Binomial Cube (Primary)		
		Trinomial Cube (Primary)		
			Building with Separate Layers	
			Building from Mixed Layers	
			Building Outside the Box	
			Building Three Layers Separately	
			Parade of Colors	
		Decanomial Cube (Primary)		
		Superimposed Geometric Figure		
			Concentric Figures	
			Tangential Figures	
			Inscribed Figures	
Language Arts				
Spoken Language				
	Foundations	Skills Inventory: Listens to and uses spoken language effectively and with increasing confidence in a variety of situations for both social interaction and self-expression and to demonstrate understanding.		
		Skills Inventory: Asks and answers questions to request clarification, seek help, or gain information.		
		Three Period Lesson		
		Vocabulary Enrichment		

Encompass Montessori Continuum - Kindergarten Lesson Sequences

			Object in the Environment	
			Sensorial Vocabulary	
			Classified Cards	
			Extensions of the Second Period	
			Extensions of the Third Period	
		Language Experience: Modeled		
			Sequence Story	
			Rhyming Words	
			Rhymes	
			Riddles	
			Fingerplays	
		Language Experience: Guided		
			Conversation	
			Storytelling	
			Poetry	
			Songs	
			Books	
			Question Game	
			Spoken Classifications: Naming Environments and Naming	
Writing				
	Foundations of Writing	Skills Inventory: Demonstrates understanding of correspondence between spoken words, letter symbols, syllables, and sounds (phonemes). Skills Inventory: Arranges the letters of the alphabet to make words, phrases, and sentences leading to paragraphs. Skills Inventory: Demonstrates correct pencil grip, adaptation of space, lightness of touch, and muscular control of the hand when writing on paper.		
		Written Language		
			The Sound Game (I Spy)	
				Initial
				Medial
				Final
			Sandpaper Letters	
				Individual Sandpaper Letters
				Double Sandpaper Letters
				Sandpaper Letters Connection Lesson

Encompass Montessori Continuum - Kindergarten Lesson Sequences

			Moveable Alphabet	
				Consonant-Vowel-Consonant (CVC)
				Blends
			Small Moveable Alphabet	
				Phonograms
		Handwriting		
			Metal Insets	
				Curvy Line
				Filling in the Gaps
				Shading
				Two Insets Together
				Three or More Insets
			Handwriting Extensions	
				Sand Tray
				Green Boards
				Paper
		Syllabication		
			Counting Syllables	
			Pronouncing Syllables	
			Segmenting Syllables	
			Blending Syllables	
	Composition	Skills Inventory: Composes (through a combination of writing, drawing, and dictating) informative, explanatory, narrative, non-fiction, and research/report writing that has a beginning, middle, and end. Skills Inventory: Responds to questions and suggestions from peers and adults to strengthen writing by adding details. Skills Inventory: Demonstrates understanding of the conventions of writing by using proper capitalization and punctuation.		
		Composition		
			Choosing a Topic	
			Sequencing Writing	
			Group Writing	
			Opinion Writing	
			Informative Writing	
			Explanatory Writing	

Encompass Montessori Continuum - Kindergarten Lesson Sequences

			Narrative Writing	
			Research, Reports, and Non-Fiction Writing	
		Editing		
			Strengthening Writing	
		Conventions		
			Capitalization	
			Punctuation	
		Publishing		
			Publication	
Reading				
	Foundations of Reading	Skills Inventory: Decodes written words using letter-sound correspondence (single letters, digraphs). Skills Inventory: Reads phonetic, non-phonetic, and puzzle words with increasing fluency. Skills Inventory: Demonstrates understanding of basic print features (follow words from left to right, top to bottom, page order, spacing). Skills Inventory: Demonstrates understanding by transitioning from invented spelling to correct spelling.		
		Phonics, Phonograms and Puzzle Words		
			Phonetic Object Box	
			Phonetic Picture Cards	
				Consonant-Vowel-Consonant (CVC)
				Blends
			Phonetic Booklets	
			Phonogram Object Box	
			Phonogram Picture Cards	
			Phonogram Booklets (Foundations)	
				Key Phonograms
				Lists
				Booklets
				Alternate Spelling Packets
				Writing One Key Phonogram
				Spelling
			Movable Alphabet with One Key Phonogram	
			Puzzle Words (Foundations)	

Encompass Montessori Continuum - Kindergarten Lesson Sequences

				Introduction
				Spelling
		Vocabulary		
			Reading Classification (Vocabulary)	
				Objects in the Environment
				Sensorial Vocabulary
				Three Part Cards
				Definition Booklets
				Definitions in Three Stages
		Print Concepts		
			Organization of Print	
			Orientation of Reading	
			Spaces Between Words	
			Parts of a Book	
	Comprehension	Skills Inventory: Reads texts (at child's level) with purpose and understanding. Skills Inventory: Demonstrates understanding of text by asking and answering questions about key details and main ideas, retelling the story in their own words, making connections, and identifying characters, setting, and major events. Skills Inventory: Identifies the role of author and illustrator and text features.		
		Fluency		
			Interpretive Reading	
			Emergent Reader Texts	
			Group Reading	
		Key Ideas and Details		
			Key Details and Main Topic	
			Retelling Stories	
			Characters	
			Setting	
			Major Events	
			Connections	
		Craft and Structure		
			Types of Texts	
			Role of Author	
			Role of Illustrator	

Encompass Montessori Continuum - Kindergarten Lesson Sequences

			Parts of a Book	
			Word Choice	
		Integration of Knowledge and Ideas		
			Relationship Between Illustrations and the Story	
			Compare and Contrast Two Stories or Texts	
	Functions of Words	Skills Inventory: Identifies the function of different parts of speech. Skills Inventory: Demonstrates an understanding of the grammar patterns used to organize words.		
		Function of Words		
			Grammar Symbols	
			Definite and Indefinite Article	
			Noun (Primary)	
				Oral Introduction
				Introduction to the Farm
				Symbolizing Phrases
			Adjective (Primary)	
				Oral Introduction
				Introduction to the Farm
				Symbolizing Phrases
				Logical Adjective Game
				Detective Adjective Game
			Conjunction (Primary)	
				Oral Introduction
				Introduction to the Farm
				Symbolizing Phrases
			Preposition (Primary)	
				Oral Introduction
				Introduction to the Farm
				Symbolizing Phrases
			Verb (Primary)	
				Oral Introduction
				Introduction to the Farm
				Symbolizing Phrases
				Actions with Objects

Encompass Montessori Continuum - Kindergarten Lesson Sequences

				Transitive and Intransitive Verbs
				Tenses
				Internal Actions
			Adverb (Primary)	
				Oral Introduction
				Introduction to the Farm
				Symbolizing Phrases
			Logical Adverb Game	
				Oral Introduction
				Introduction to the Farm
				Symbolizing Phrases
			Continuation of Commands	
			Pattern Cards	
			Question Words	
		Sentence Analysis (Primary)		
			Simple Sentences: Hunting the Subject	
			Simple Sentences: Hunting the Object	
			Simple Sentences: Independent Work	
			Simple Sentences: Extensions	
			Simple Sentences: Attributes	
			Simple Sentences: Appositions	
		Word Study		
			Masculine and Feminine	
			Singular and Plural	
			Prefixes and Suffixes	
			Compound Words	
			Contractions	
			Word Families	
			Synonyms	
			Antonyms	
			Homonym	

Encompass Montessori Continuum - Kindergarten Lesson Sequences

Mathematics				
Mathematical Practice				
	Problem Solving	Skills Inventory: Solve problems in all areas of the Montessori math curriculum, attending to precision in use of the materials, communication, and calculations, and persevering by trying different approaches and seeking support.		
	Communication: Reasoning and Explaining	Skills Inventory: Demonstrates understanding of the Montessori math curriculum by explaining their own reasoning and responding to the reasoning of others.		
	Modeling and Using Tools	Skills Inventory: Represents math problems in multiple ways such as using Montessori materials, numbers, words, drawing pictures, acting out, making a chart or list, or creating equations.		
	Seeing Structures and Generalizing (Patterns)	Skills Inventory: Identifies patterns that exist in mathematics and/or with the Montessori materials.		
The Decimal System				
	Number and Quantity One to Ten	Skills Inventory: Demonstrates understanding of counting, one-to-one correspondence, and number symbols for 1 to 10.		
		Number Names and Counting Sequence		
			Number Rods	
				Introduction to Quantity
				Games with Quantities
			Sandpaper Numerals	
			Number Rods and Cards	
				Association of Quantity and Symbol
				Distance Games
				Impression of Subtraction
				Arranging in Sequence
				Impression of Addition
			Spindle boxes	
			Zero Game	
			Cards and Counters	
				Introduction
				Odds and Evens
			Bead Stair	
			Memory game of Numbers	
			Number Writing	
			Counting 0-10 Objects	
			Counting 0-20 Objects	
		Comparing Numbers		

Encompass Montessori Continuum - Kindergarten Lesson Sequences

			Greater Than, Less Than, Equal To	
			Compare Quantity of Written Numerals	
	Number and Quantity Greater than Ten	Skills Inventory: Demonstrates understanding of counting, one-to-one correspondence, and number symbols for 1 to 1,000. Skills Inventory: Demonstrates understanding of the concept of units, tens, hundreds, and thousands by recognizing number patterns that recur across hierarchy families (simple, family of thousands, family of millions). Skills Inventory: Demonstrates understanding of the function of zero as a placeholder and 9 as a counting limit.		
		Number Names and Counting Sequence		
			Golden Beads: Number Names and Counting Sequence	
				Introduction to Quantity
				Games with Quantities
			Number Cards: Number Names and Counting Sequence	
				Introduction to Symbol
				Games with Symbols
			Beads and Cards: Number Names and Counting Sequence	
				Association of Quantity and Symbol
				Formation of Numbers
				Formation of Numbers with Zero
				Tray of Nine
			Bead Cabinet: Number Names and Counting Sequence	
				100 Chain
				Short Chains
				1000 Chain
				Long Chains
				Skip Counting
				Recording the Chains
				Exploring the Chains
				Number Pyramid
				Exploration with the Geometric Cabinet
		Comparing Numbers		
			Teens	
				Introduction to Quantity
				Games with Quantities
				Introduction to Symbols

Encompass Montessori Continuum - Kindergarten Lesson Sequences

				Games with Symbols
				Association of Quantity and Symbol
			Tens	
				Tens
				Naming the Tens
				Counting from 10-99
			Numeral Writing	
			Greater Than, Less Than, Equal To	
			Compare Quantity of Written Numerals	
Whole Number Operations				
	Operations	Skills Inventory: Performs all four operations with 4-digit numbers using Montessori materials.		
		Golden Beads: Operations		
			Golden Beads: Addition	
				Static
				Change Game
				Dynamic
			Golden Beads: Multiplication	
				Static
				Dynamic
			Golden Beads: Subtraction	
				Static
				Dynamic
			Golden Beads: Division	
				2-Digit Divisor
				Short Division
				Long Division
		Stamp Game: Operations		
			Stamp Game: Addition	
				Introduction
				Static
				Dynamic
			Stamp Game: Multiplication	
				Static

Encompass Montessori Continuum - Kindergarten Lesson Sequences

				Dynamic
			Stamp Game: Subtraction	
				Static
				Dynamic
			Stamp Game: Division	
				Short Division
				2-Digit Divisor
				3-4 Digit Divisor
				0 in the Middle of the Divisor
				0 in the Units of the Divisor
	Passages to Abstraction	Skills Inventory: Demonstrates understanding of one-to-one correspondence, place value, numeration, and operations using Montessori materials and more abstract methods to solve an equation.		
		Dot Game: Passages to Abstraction		
			One Number at a Time	
			Column Addition	
		Small Bead Frame: Passages to Abstraction		
			Introduction	
			Addition	
			Subtraction	
			Naming Quantities by Category	
			Multiplication	
		Decomposing Numbers		
			Seguin Boards	
			Addition Strip Board	
			Subtraction Strip Board	
			Golden Beads	
		Recording in the Four Operations		
		Problem Solving: Whole Number Operations		
	Memorization	Skills Inventory: Identifies the essential combinations of math facts in all four operations using the Montessori materials leading to fluency.		
		Addition: Memorization		
			Snake Game: Addition	
				Counting the Snake
				Two by Two

Encompass Montessori Continuum - Kindergarten Lesson Sequences

				Matching the 10s (Control of Error)
			Strip Board: Addition	
				Exploration
				Using the Tables
				Essential Combinations
				How Many Ways?
				The Commutative Law
			Chart: Addition	
				Full
				Commutative
				Odd and Even
				Blank
		Subtraction: Memorization		
			Snake Game: Subtraction	
				Counting the Snake
				Control of Error
				Two by Two
			Strip Board: Subtraction	
				Exploration
				Essential Combinations
				How Many Ways?
			Chart: Subtraction	
				Practice
				Blank
		Multiplication: Memorization		
			Bead Bars: Multiplication	
				Exploring the Tables
				How Many Ways?
				Multiplying by 10
			Bead Board: Multiplication	
			Chart: Multiplication	
				Full
				Commutative

Encompass Montessori Continuum - Kindergarten Lesson Sequences

				Blank
		Division: Memorization		
			Unit Board: Division	
				Exploration
				Division from 81
				Finding Essential Combinations
				Connection to Multiplication
			Chart: Division	
				Practice
				Blank
Fractions		Skills Inventory: Demonstrates understanding of the language of fractions (quantities <1) and the concept of fractions as the equal parts of a whole. Skills Inventory: Performs all four operations with fractions using Montessori materials.		
	Foundations and Equivalence			
		Making Designs		
		Introduction to Quantity		
		Naming the Fractions		
		Introduction to Symbols		
		Equivalence		
	Operations: Sensorial			
		Addition: Fractions Operations		
		Subtraction: Fractions Operations		
		Multiplication: Fractions Operations		
		Division: Fractions Operations		
Money		Skills Inventory: Demonstrates understanding of money by identifying and naming coins (penny, nickel, dime, quarter) and counting the value of coins to \$1.00.		
	Sorting and Matching Money			
	Counting Money up to \$1			
Primary to Elementary Transitional Materials				
	Wooden Hierarchical Material: Transitional			
		Introduction to Quantity		
		Introduction to Symbol		
		Association of Quantity and Symbol		
	Large Bead Frame: Transitional			

Encompass Montessori Continuum - Kindergarten Lesson Sequences

		Introduction		
		Operations		
	Racks and Tubes: Transitional			
		Short Division		
Natural Sciences				
Earth Science				
	Physical Geography	Skills Inventory: Identifies air, land and water including continents and oceans of the world and types of landforms and water forms. Skills Inventory: Identifies weather as the combination of sunlight, wind, snow or rain and understands how weather impacts the earth. Skills Inventory: Demonstrates understanding that temperature varies by region and time of year.		
		Air, Land and Water		
			Air, Land and Water	
			Globes	
				Sandpaper Globe
				Painted Globe
			Water and Land Forms	
				Three Part Cards
				Models
		Weather and Climate		
			Sun	
			Wind, Snow, Rain	
			Temperature	
			Weather Conditions	
			Weather, Plants and Animals	
Life Science		Skills Inventory: Demonstrates understanding of the differences between living and non-living. Skills Inventory: Identifies the parts of plants and needs of plants. Skills Inventory: Identifies the internal and external parts of animals and needs of animals. Skills Inventory: Demonstrate understanding of the differences between vertebrates and invertebrates. Skills Inventory: Demonstrates understanding that plants and animals require different habitats to survive.		
	Biology			
		Nature Walks		

Encompass Montessori Continuum - Kindergarten Lesson Sequences

		Living and Non-Living Object/ Card Sort		
		Plant and Animal Object/Card Sorts		
	Zoology			
		Vertebrates and Invertebrates		
			Vertebrate and Invertebrate Object/Card Sorts	
			Vertebrate Puzzles	
			Classified Nomenclature— External Parts	
		Life Cycles		
			Life Cycle of a Frog	
			Life Cycle of a Butterfly	
	Botany			
		Leaf Cabinet		
			Tracing the Cabinet	
			Leaf Cards	
		Puzzles: Botany		
			Parts of a Plant	
			Parts of a Leaf	
			Parts of a Flower	
		Nomenclature Cards		
			Parts of a Plant	
			Parts of a Leaf	
			Parts of a Flower	
	Ecology			
		Animals, Plants, and the Environment		
			Basic Needs of Living Things	
			Adaptations of Living Things	
			Seasons	
			Natural Resources	
			Trash and Recycling	

Encompass Montessori Continuum - Kindergarten Lesson Sequences

Physical Science		Skills Inventory: Demonstrates understanding of magnetism and can sort magnetic or non-magnetic objects. Skills Inventory: Demonstrates understanding of buoyancy and can sort objects that sink or float. Skills Inventory: Demonstrates understanding of light by identifying objects as translucent or opaque. Skills Inventory: Demonstrates the impacts of pushing or pulling an object and can describe the speed and direction of an object.		
	Science and Engineering Practices			
		Magnetic/non-magnetic		
		Sink and Float		
		Translucent and Opaque		
		Forces and Interactions		
Social Studies				
History, Economics, and Civics				
	History	Skills Inventory: Demonstrates understanding of past, present, and future by retelling events from their life in sequential order. Skills Inventory: Demonstrates understanding of time measurement, including minutes, hours, days, months, and year.		
		The Clock		
			Introduction to the Clock	
			Telling Time	
		Life Events		
			Cause and Effect	
			Past, Present, Future	
	Economics	Skills Inventory: Demonstrates understanding by describing what money is and how it is used in society including goods, services, and scarcity.		
		Money		
		Goods		
		Services		
		Scarcity		
	Civics	Skills Inventory: Demonstrates understanding by identifying school leadership, following the rules of the classroom and school, and participating in classroom and school issues or problems with respect.		
		Opportunities to Participate in the School and Classroom		
			Sense of Self	
			Collaboration and Cooperation	
			Class Agreements and Class Jobs	

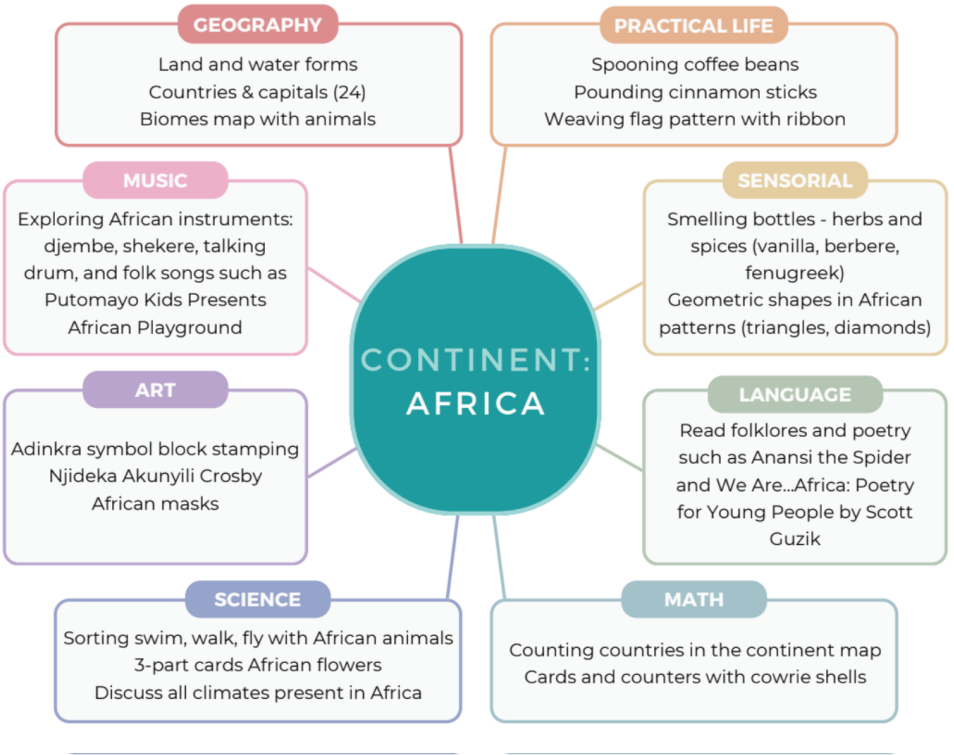
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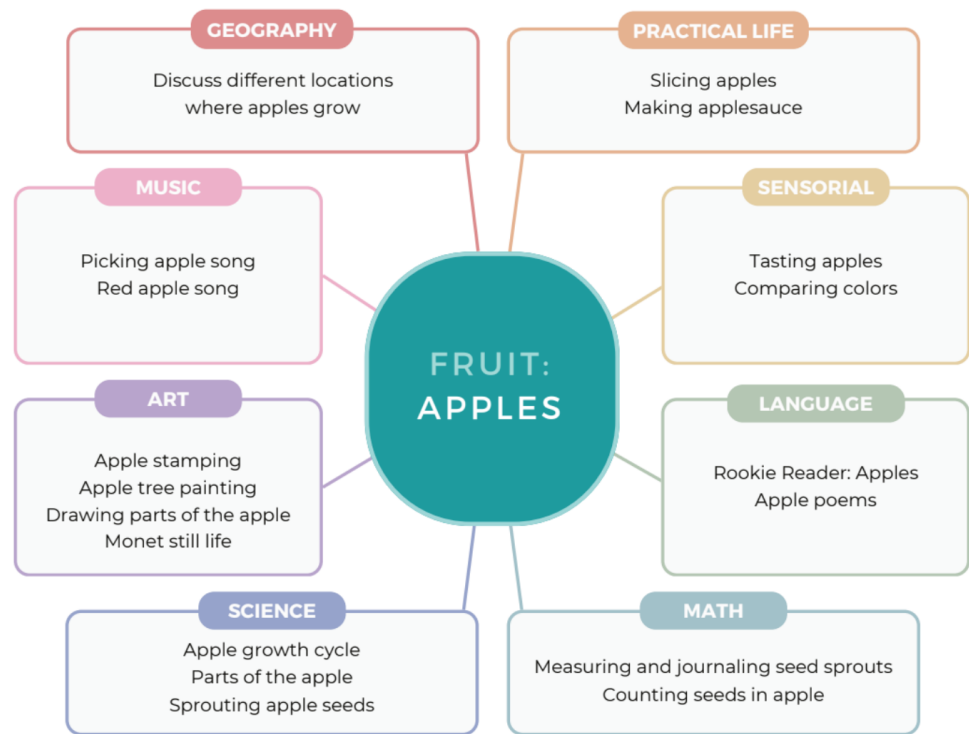
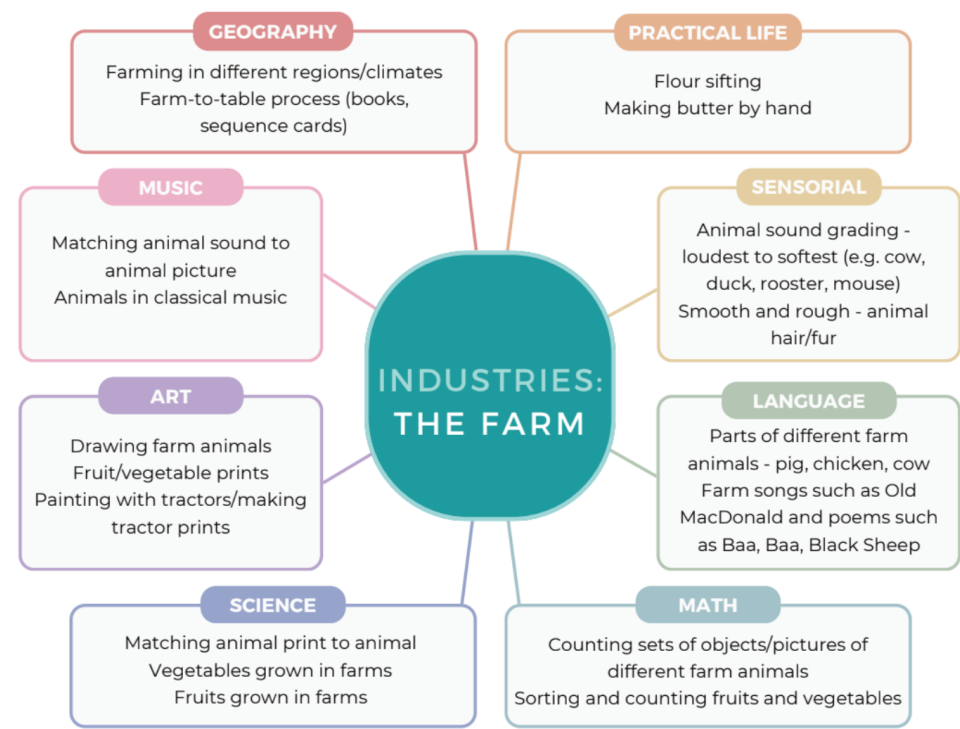
			Resolving Conflicts	
			Cause and Effect	
		Life Beyond the School		
			Child's Cosmic Address	
			People in Our Community	
			Staying Safe	
Political Geography		Skills Inventory: Understands the different uses for globes and maps Skills Inventory: Identifies the political geography of the world including continents and countries. Skills Inventory: Identifies the flags of the world.		
	Puzzle Maps			
		From Maps to Globes		
		World Map of the Continents		
		Individual Maps		
			North America Map	
			South America Map	
			Africa Map	
			Asia Map	
			Oceania Map	
			Europe Map	
			USA Map	
	Map Making			
		World Map		
			Tracing	
			Push Pins	
		Continent Map		
			Tracing	
	Mapping			
		Make a Map and Use a Map		
		The Model Town or Farm		
	Geography Folders			
		Different Types of Homes		
	Flags			
		Flags		

Encompass Montessori Continuum - Kindergarten Lesson Sequences

		Matching Flags to their Countries		
		Introduction to the Parts of a Flag		
	Biomes of the Earth			
	Environmental Impact			

Samples of Montessori Integrated Theme Units





The Decimal System: Number and Quantity One to Ten

SKILLS INVENTORY	
Demonstrates understanding of counting, one-to-one correspondence and number symbols for 1 to 10.	
MONTESORI LESSON(S)	PURPOSE
NUMBER NAMES AND COUNTING SEQUENCE	
NUMBER RODS - Introduction to Quantity - Games with Quantities	- To experience the quantities of each number and to learn their respective names. - To show each number through a single object separate from the others: quantity as a single entity. - To memorize the sequence of the numbers 1-10 - To be sure the child has all the ideas of quantity before introducing symbols
SANDPAPER NUMERALS	- To introduce the child to the symbols for the numbers s/he already knows - To provide a key to the world of written numbers - Preparation for writing numerals
NUMBER RODS AND CARDS - Association of Quantity and Symbol - Distance Game - Arranging in Sequence - Impression of Addition - Impression of Subtraction	- Connects the symbols and the concrete representation of quantity + shows the child they are the same. - To see the hierarchical order 1-10 exactly laid out. - To show concrete examples of ways to add quantities. - Precursor to addition + subtraction.
SPINDLE BOXES	- To clarify quantity as a set of separate objects - To clarify that symbols represent a certain quantity of separate objects - To introduces zero as the empty set and its symbol - To reinforce the sequence of the numerals 0-9 - To reinforce the idea that 0-9 are the only numerals in our system of numeration
ZERO GAME	To provide a concrete experience that zero is a placeholder for nothing.
CARDS AND COUNTERS - Introduction - Odds and Evens	- To reinforce the knowledge that each number is made up of separate quantities - To verify the sequence of numbers from 1-10 - To verify the quantities that correspond to each symbol - To indicate the odd and even numbers - To see the concrete difference between odds and evens. - Preparation for the divisibility of numbers
BEAD STAIR	- To associate numerals with bead bars representing quantities 1 — 9 - To practice linear counting
MEMORY GAME OF NUMBERS	- To develop the power of memory to hold a numeric symbol in the mind - To help the child transfer knowledge of the numbers from 0-10 from the specific materials to the objects of daily life
COMPARING NUMBERS	
Greater than, Less than, equal to	To compare 2 set of objects as greater than, less than, or equal to
Compare quantity of written numerals	To compare two written numerals

ASSESSMENT VOCABULARY		
array circle compare count equal greater than (>) group/grouping how many large/larger number name less than (<)	line number number name number order ones pair quantity rectangular array represent zero	<u>Cognitive Verbs</u> answer arrange compare identify present refer represent understand
ASSESSMENT CONSIDERATIONS		
Students will be asked to: NUMBER NAMES AND COUNTING SEQUENCE - begin counting forward from any number (within the known sequence) (K.CC.A.2) - write numbers from 0 to 10 (K.CC.A.3) - represent a number of objects with a written numeral 0-10 (K.CC.A.3) - use 0 to represent a count of no objects (K.CC.A.3) - demonstrate understanding of the relationship between numbers and quantities (K.CC.B.4) - connect counting to cardinality (K.CC.B.4) - say the number names in the standard order (K.CC.B.4.A) - pair each object with one number name and each number name with one object (K.CC.B.4.A) - demonstrate understanding that the last number name said tells the number of objects counted (K.CC.B.4.B) - demonstrate understanding that the number of objects is the same regardless of their arrangement or the order in which they were counted (K.CC.B.4.B) - demonstrate understanding that each successive number name refers to a quantity that is one larger (K.CC.B.4.C) - answer "how many?" questions by counting up to 20 things arranged in a line, a rectangular array, or a circle (K.CC.B.5) - answer "how many?" questions by counting up to 10 things in a scattered configuration - count out that number of objects when given a number from 1-20 (K.CC.B.5) COMPARING NUMBERS - identify whether the number of objects in one group is greater than, less than, or equal to the number of objects in another group (matching and counting strategies) (K.CC.C.6) - compare two numbers presented as written numerals (between 1 and 10) (K.CC.C.7)		
DEVELOPMENTAL PROGRESSION		
36 TO 48 MONTHS	48 TO 60 MONTHS	By 60 MONTHS
P-MATH 1. Child knows number names and the count sequence.		
Says or signs some number words in sequence (up to 10), starting with one. Understands that counting words are separate words, such as "one," "two," "three" versus "onetwothree".	Says or signs more number words in sequence.	Counts verbally or signs to at least 20 by ones.
P-MATH 2. Child recognizes the number of objects in a small set		
Develops an understanding of what whole numbers mean. Begins to recognize the number of small objects in	Quickly recognizes the number of objects in a small set (referred to as "subitizing").	Instantly recognizes, without counting, small quantities of up to 5

groups without counting (referred to as “subitizing”).		objects and says or signs the number.
P-MATH 3. Child understands the relationship between numbers and quantities.		
Begins to coordinate verbal counting with objects by pointing to or moving objects for small groups of objects laid in a line (referred to as one-to-one correspondence). Begins to understand that the last number represents how many objects are in a group (referred to as “cardinality”).	Understands that number words refer to quantity. May point to or move objects while counting objects to 10 and beyond (one-to-one correspondence). Understands that the last number represents how many objects are in a group (cardinality).	• When counting objects, says or signs the number names in order, pairing one number word that corresponds with one object, up to at least 10. • Counts and answers “How many?” questions for approximately 10 objects. • Accurately counts as many as 5 objects in a scattered configuration. • Understands that each successive number name refers to a quantity that is one larger. • Understands that the last number said represents the number of objects in a set.
P-MATH 4. Child compares numbers.		
Begins to accurately count and compare objects that are about the same size and are in small groups with adult assistance, such as counts a pile of 2 blocks and a pile of 4, and determines whether the piles have the same or different numbers of blocks. Identifies the first and second objects in a sequence.	Counts to determine and compare number amounts even when the larger group’s objects are smaller in size, such as buttons, compared with the smaller group’s objects that are larger in size, such as markers. Uses numbers related to order or position.	• Identifies whether the number of objects in one group is more than, less than, or the same as objects in another group for up to at least five objects. • Identifies and uses numbers related to order or position from first to tenth.
P-MATH 5. Child associates a quantity with written numerals up to 5 and begins to write numbers.		
Begins to understand that a written numeral represents a quantity and may draw objects or use informal symbols to represent numbers.	Understands that written numbers represent quantities of objects, and uses information symbols, such as a tally, to represent numerals. With adult support, writes some numerals up to 10.	• Associates a number of objects with a written numeral 0–5. • Recognizes and, with support, writes some numerals up to 10.

Based on *Head Start Early Learning Outcomes Framework*

STANDARDS	
CCSS.MATH.CONTENT.K.CC.A.2	Count forward beginning from a given number within the known sequence (instead of having to begin at 1).
CCSS.MATH.CONTENT.K.CC.A.3	Write numbers from 0 to 20. Represent a number of objects with a written numeral 0-20 (with 0 representing a count of no objects).
CCSS.MATH.CONTENT.K.CC.B.4.A	When counting objects, say the number names in the standard order, pairing each object with one and only one number name and each number name with one and only one object.
CCSS.MATH.CONTENT.K.CC.B.4.B	Understand that the last number name said tells the number of objects counted. The number of objects is the same regardless of their arrangement or the order in which they were counted.

CCSS.MATH.CONTENT.K.CC.B.4.C	Understand that each successive number name refers to a quantity that is one larger.
CCSS.MATH.CONTENT.K.CC.B.5	Count to answer "how many?" questions about as many as 20 things arranged in a line, a rectangular array, or a circle, or as many as 10 things in a scattered configuration; given a number from 1-20, count out that many objects.
CCSS.MATH.CONTENT.K.CC.C.6	Identify whether the number of objects in one group is greater than, less than, or equal to the number of objects in another group, e.g., by using matching and counting strategies.
CCSS.MATH.CONTENT.K.CC.C.7	Compare two numbers between 1 and 10 presented as written numerals.

Based on *Common Core State Standards*

The Decimal System: Number and Quantity Greater than Ten

SKILLS INVENTORY	
• Demonstrates understanding of counting, one-to-one correspondence and number symbols for 1 to 1,000. • Demonstrates understanding of the concept of units, tens, hundreds by recognizing number patterns that recur across hierarchy families (simple, family of thousands, family of millions) • Demonstrates understanding of the function of zero as a placeholder and 9 as a counting limit.	
MONTESORI LESSON(S)	PURPOSE
NUMBER NAMES AND COUNTING SEQUENCE	
GOLDEN BEADS • Introduction to Quantity • Games with Quantities	• To introduce the names for quantities in each category (“unit”; “ten”; “hundred”; “thousand”) • To show the relationship between one category and the next • To offer the child the sensorial experience of the relative sizes of the categories (bulk) • To extend the sensorial experience of the different categories and the difference in bulk, for instance, between 6 units and 6 hundreds
NUMBER CARDS • Introduction to Symbol • Games with Symbols	• To show the relationship between one category and the next. • To offer the child the sensorial experience of the relative sizes of the categories (bulk). • To introduce the symbols for the quantities in the Decimal System. • To reinforce language of the categories • To introduce the symbols for multiple 1000's, 100's, 10's, 1's
BEADS AND CARDS • Association of Quantity and Symbol • Formation of Numbers • Formation of Numbers with Zero • Tray of Nine	• To associate the concrete representation and symbolic representation of the categories. • To introduce the names for quantities in each category (“unit”; “ten”; “hundred”; “thousand”) • To show the relationship between one category and the next • To offer the child the sensorial experience of the relative sizes of the categories (bulk) • To extend the sensorial experience of the different categories and the difference in bulk, for instance, between 6 units and 6 hundreds • To introduce the symbols for the quantities in the Decimal System • To ensure the child knows that zero can hold a place for a category.
BEAD CABINET • 100 chain • Short Chains • 1000 chain • Long Chains • Skip Counting • Recording the Chains ○ Exploring the Chains ○ Number Pyramid ○ Exploration with the Geometric Cabinet	• To consolidate linear counting. • To give a sensorial impression of the difference between 10^2 and 10^3. • To solidify the idea that 100 is 10 tens, and 10 hundreds is 1000. • Comparison of the squares and cubes of the numbers 1-10 • To give the child another means of counting in a series. • Practice writing numerals. • Motivation to repeatedly count the long and short chains. • Indirect preparation for multiplication, squaring, cubing, and bases other than base ten.
COMPARING NUMBERS	
SEGUIN BOARDS • Teens ○ Introduction to Quantity ○ Games with Quantities ○ Introduction to Symbols	• To introduce the quantities 11-19 with their names. • To see the relationship of the numbers 1-9 to the number 10. • To give the symbols for the numbers 11-19. • To help the child become secure with the symbols for the numbers 11-19. • Association of the quantity, name, and symbol for the teens (11-19).

○ Games with Symbols ○ Association of Quantity and Symbol	
SEGUIN BOARDS ● Tens ○ Naming the Tens ○ Counting from 10-99	● To introduce the conventional names for the tens quantities: “twenty”, “thirty”, “forty”... “ninety” ● To realize how the numbers progress from one ten to the next ● To connect name, quantity, and symbol for the numbers 11-99
● Greater than, Less than, equal to	● To compare 2 set of objects as greater than, less than, or equal to
● Compare quantity of written numerals	● To compare two written numerals

ASSESSMENT VOCABULARY

array	less than (<)	<u>Cognitive Verbs</u>
circle	line	answer
compose	number	arrange
count	number name	compose
decompose/decomposition	number order	decompose
equal	ones	Identify
equation	pair	record
greater than (>)	quantity	refer
group/grouping	rectangular array	represent
how many	represent	understand
large/larger	zero	

ASSESSMENT CONSIDERATIONS

Students will be asked to:

NUMBER NAMES AND COUNTING SEQUENCE

- count to 100 by ones (K.CC.A.1)
- count to 100 by tens (K.CC.A.1)
- begin counting forward from any number (within the known sequence) (K.CC.A.2)
- write numbers from 0 to 20 (K.CC.A.3)
- represent a number of objects with a written numeral 0-20 (K.CC.A.3)
- use 0 to represent a count of no objects (K.CC.A.3)
- demonstrate understanding of the relationship between numbers and quantities (K.CC.B.4)
- connect counting to cardinality (K.CC.B.4)
- say the number names in the standard order (K.CC.B.4.A)
- pair each object with one number name and each number name with one object (K.CC.B.4.A)
- demonstrate understanding that the last number name said tells the number of objects counted (K.CC.B.4.B)
- demonstrate understanding that the number of objects is the same regardless of their arrangement or the order in which they were counted (K.CC.B.4.B)
- demonstrate understanding that each successive number name refers to a quantity that is one larger (K.CC.B.4.C)
- answer “how many?” questions by counting up to 20 things arranged in a line, a rectangular array, or a circle (K.CC.B.5)
- answer “how many?” questions by counting up to 10 things in a scattered configuration
- count out that number of objects when given a number from 1-20 (K.CC.B.5)

COMPARING NUMBERS - identify whether the number of objects in one group is greater than, less than, or equal to the number of objects in another group (matching and counting strategies) (K.CC.C.6) - compose and decompose numbers from 11 to 19 into tens and ones (using objects or drawings) (K.NBT.A.1) - record composition or decomposition of numbers by a drawing or equation (K.NBT.A.1) - demonstrate understanding that these numbers are composed of tens and ones (K.NBT.A.1)
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DEVELOPMENTAL PROGRESSION		
36 TO 48 MONTHS	48 TO 60 MONTHS	By 60 MONTHS
P-MATH 1. Child knows number names and the count sequence.		
Says or signs some number words in sequence (up to 10), starting with one. Understands that counting words are separate words, such as “one,” “two,” “three” versus “onetwothree”.	Says or signs more number words in sequence.	Counts verbally or signs to at least 20 by ones.

Based on *Head Start Early Learning Outcomes Framework*

STANDARDS	
CCSS.MATH.CONTENT.K.CC.A.1	Count to 100 by ones and by tens.
CCSS.MATH.CONTENT.K.CC.A.2	Count forward beginning from a given number within the known sequence (instead of having to begin at 1).
CCSS.MATH.CONTENT.K.CC.A.3	Write numbers from 0 to 20. Represent a number of objects with a written numeral 0-20 (with 0 representing a count of no objects).
CCSS.MATH.CONTENT.K.CC.B.4	Understand the relationship between numbers and quantities; connect counting to cardinality.
CCSS.MATH.CONTENT.K.CC.B.4.A	When counting objects, say the number names in the standard order, pairing each object with one and only one number name and each number name with one and only one object.
CCSS.MATH.CONTENT.K.CC.B.4.B	Understand that the last number name said tells the number of objects counted. The number of objects is the same regardless of their arrangement or the order in which they were counted.
CCSS.MATH.CONTENT.K.CC.B.4.C	Understand that each successive number name refers to a quantity that is one larger.
CCSS.MATH.CONTENT.K.CC.B.5	Count to answer "how many?" questions about as many as 20 things arranged in a line, a rectangular array, or a circle, or as many as 10 things in a scattered configuration; given a number from 1-20, count out that many objects.
CCSS.MATH.CONTENT.K.CC.C.6	Identify whether the number of objects in one group is greater than, less than, or equal to the number of objects in another group, e.g., by using matching and counting strategies.
CCSS.MATH.CONTENT.K.NBT.A.1	Compose and decompose numbers from 11 to 19 into ten ones and some further ones, e.g., by using objects or drawings, and record each composition or decomposition by a drawing or equation (such as $18 = 10 + 8$); understand that these numbers are composed of ten ones and one, two, three, four, five, six, seven, eight, or nine ones.

Based on *Common Core State Standards*

Whole Number Operations

SKILLS INVENTORY	
Performs all four operations with 4-digit numbers using Montessori Manipulatives.	
MONTESSORI LESSON(S)	PURPOSE
GOLDEN BEADS	
ADDITION • Static • Change Game • Dynamic	• To show that 10 of a category equals 1 of the next higher category: the dynamics of the decimal system • To understand the role of changing from one category to the next • To give the sensorial impression of addition: Putting quantities together to form a larger quantity • To practice the role of changing from one category to the next
MULTIPLICATION • Static • Dynamic	• To give the sensorial impression of multiplication: Putting together equal quantities to form a larger quantity • To show that multiplication is the addition of equal quantities
SUBTRACTION • Static • Dynamic	• To give the sensorial impression of subtraction: Taking away smaller quantities from a larger quantity • To further the understanding of the dynamics of the Decimal System • To reinforce the role of changing from one category to the next – from higher to lower category
DIVISION • Short Division • Long Division • 2-digit divisor	• To give the sensorial impression of division: Sharing a quantity into a certain number of equal parts • To show how quantities are distributed in Long Division • To show that the answer in Division is the amount that one of the units in the divisor receives • To reinforce the dynamics of the Decimal System • To reinforce the role of changing from one category to the next – from higher to lower category
STAMP GAME	
ADDITION • Introduction • Static • Dynamic	• To reinforce and consolidate by means of individual work the understanding of addition acquired through the collective exercises • To further the sensorial experience of place value • To begin to write compound numbers (quantities of more than one category) • To apply the symbol (+) for addition to the decimal system
MULTIPLICATION • Static • Dynamic	• To reinforce and consolidate by means of individual work the understanding of multiplication acquired through the collective exercises • To further the sensorial experience of place value • To begin to write compound numbers (quantities of more than one category) • To apply the symbols for multiplication (x) to the decimal system • To show the child that multiplication is just adding the same number a certain number of times.
SUBTRACTION • Static • Dynamic	• To reinforce and consolidate by means of individual work the understanding of subtraction acquired through the collective exercises • To further the sensorial experience of place value • To begin to write compound numbers (quantities of more than one category) • To apply the symbol (-) for subtraction to the decimal system • The way the stamps are used shows the children that subtraction is the opposite of addition

DIVISION - Short Division 2 digit divisor 3-4 digit divisor 0 in the middle of the divisor 0 in the unit of the divisor	- To reinforce and consolidate by means of individual work the understanding of division acquired through the collective exercises - To further the sensorial experience of place value - To begin to write compound numbers (quantities of more than one category) - To apply the symbols for division ($\div$) to the decimal system - To show the child that Division is the opposite of Multiplication - To practice long division and understand what to do when there is a zero in the units place of the divisor.
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ASSESSMENT VOCABULARY		
addition equation expression	represent subtraction	<u>Cognitive Verbs</u> act out represent

ASSESSMENT CONSIDERATIONS
Students will be asked to: - represent addition with objects (Montessori materials), fingers, mental images, drawings, sounds (e.g., claps), acting out situations, verbal explanations, expressions, or equations (K.OA.A.1) - represent subtraction with objects (Montessori Materials), fingers, mental images, drawings, sounds (e.g., claps), acting out situations, verbal explanations, expressions, or equations (K.OA.A.1)

DEVELOPMENTAL PROGRESSION		
36 TO 48 MONTHS	48 TO 60 MONTHS	BY 60 MONTHS
P-MATH 6. Child understands addition as adding to and understands subtraction as taking away from.		
Begins to add and subtract very small collections of objects with adult support. For example, the teacher says, "You have 3 grapes and get 1 more. How many in all?" Child counts out 3, then counts out 1 more, then counts all 4: "1, 2, 3, 4. I have 4!"	Solves addition problems by joining objects together and subtraction problems by separating, using manipulatives and fingers to represent objects.	- Represents addition and subtraction in different ways, such as with fingers, objects, and drawings. - Solves addition and subtraction word problems. Adds and subtracts up to 5 to or from a given number. - With adult assistance, begins to use counting on from the larger number for addition. For example, when adding a group of 3 and a group of 2, counts "One, two, three..." and then counts on "Four, five!" (keeping track with fingers). When counting back for subtraction such as taking away 3 from 5, counts, "Five, four, three...two!" (keeping track with fingers).

Based on *Head Start Early Learning Outcomes Framework*

STANDARDS	
CCSS.MATH.CONTENT.K.OA.A.1	Represent addition and subtraction with objects, fingers, mental images, drawings, sounds (claps), acting out situations, verbal explanations, expressions, or equations.

Based on *Common Core State Standards*

Whole Number Operations: Passages to Abstraction

SKILLS INVENTORY		
Demonstrates understanding of one-to-one correspondence, place value, numeration and operations using Montessori materials and more abstract methods to solve an equation.		
MONTESSORI LESSON(S)	PURPOSE	
DOT GAME - One Number at a Time - Column Addition	- To focus on the mechanism of carrying numbers up to the next category - To reinforce the relationship of one category to another - To prepare the child for abstract addition.	
SMALL BEAD FRAME - Introduction - Addition - Subtraction - Naming Quantities by Category - Multiplication	- To provide the child with an opportunity to work in a more symbolic way with addition, subtraction, and multiplication. - To offer an opportunity for the child to apply memorized knowledge of the essential combinations. - To reinforce that there are not more than 9 in any category in the decimal system. - To reinforce zero as a place holder. - To reinforce the importance of straight lines when recording columns of numbers. - To offer an opportunity to practice recording quantities.	
Decomposing Numbers	- To decompose numbers less than or equal to 10 into pairs - To find the number that makes 10 when added to a given number - To compose and decompose numbers from 11 to 19 into tens and ones - To demonstrate understanding that numbers are composed of tens and ones	
Word Problems	- To verify the concepts of the operations of the decimal system. - To offer an opportunity to apply the knowledge of the operations to real-life situations. - To give the child another outlet for his explosion into reading and writing.	
ASSESSMENT VOCABULARY		
add addition compose decompose/decomposition equal equation expression less than (<)	number ones pair represent subtract subtraction word problem	<u>Cognitive Verbs</u> act out answer compose understand decompose record represent solve
ASSESSMENT CONSIDERATIONS		
Students will be asked to: ADDITION - represent addition with objects (Montessori materials), fingers, mental images, drawings, sounds (e.g., claps), acting out situations, verbal explanations, expressions, or equations (K.OA.A.1) - record answers with a drawing or equation (K.OA.A.4) SUBTRACTION - represent subtraction with objects (Montessori Materials), fingers, mental images, drawings, sounds (e.g., claps), acting out situations, verbal explanations, expressions, or equations (K.OA.A.1) - record answers with a drawing or equation (K.OA.A.4)		

DECOMPOSING NUMBERS

- decompose numbers less than or equal to 10 into pairs in more than one way (using objects or drawings) (K.OA.A.3)
- record each decomposition by a drawing or equation (K.OA.A.3)
- find the number that makes 10 when added to a given number (using objects or drawings) (K.OA.A.4)
- compose and decompose numbers from 11 to 19 into tens and ones (using objects or drawings) (K.NBT.A.1)
- record composition or decomposition of numbers by a drawing or equation (K.NBT.A.1)
- demonstrate understanding that these numbers are composed of tens and ones (K.NBT.A.1)

WORD PROBLEMS

- solve addition word problems (K.OA.A.2)
- add within 10 (using objects or drawings to represent the problem) (K.OA.A.2)
- solve subtraction word problems, and add and subtract within 10 (using objects or drawings to represent the problem) (K.OA.A.2)
- subtract within 10 (using objects or drawings to represent the problem) (K.OA.A.2)

DEVELOPMENTAL PROGRESSION

36 TO 48 MONTHS	48 TO 60 MONTHS	By 60 MONTHS
P-MATH 6. Child understands addition as adding to and understands subtraction as taking away from.		
Begins to add and subtract very small collections of objects with adult support. For example, the teacher says, "You have 3 grapes and get 1 more. How many in all?" Child counts out 3, then counts out 1 more, then counts all 4: "1, 2, 3, 4. I have 4!"	Solves addition problems by joining objects together and subtraction problems by separating, using manipulatives and fingers to represent objects.	• Represents addition and subtraction in different ways, such as with fingers, objects, and drawings. • Solves addition and subtraction word problems. Adds and subtracts up to 5 to or from a given number. • With adult assistance, begins to use counting on from the larger number for addition. For example, when adding a group of 3 and a group of 2, counts "One, two, three..." and then counts on "Four, five!" (keeping track with fingers). When counting back for subtraction such as taking away 3 from 5, counts, "Five, four, three...two!" (keeping track with fingers).

Based on *Head Start Early Learning Outcomes Framework***STANDARDS**

CCSS.MATH.CONTENT.K.OA.A.1	Represent addition and subtraction with objects, fingers, mental images, drawings, sounds (claps), acting out situations, verbal explanations, expressions, or equations.
CCSS.MATH.CONTENT.K.OA.A.2	Solve addition and subtraction word problems, and add and subtract within 10, e.g., by using objects or drawings to represent the problem.
CCSS.MATH.CONTENT.K.OA.A.3	Decompose numbers less than or equal to 10 into pairs in more than one way, e.g., by using objects or drawings, and record each decomposition by a drawing or equation (e.g., $5 = 2 + 3$ and $5 = 4 + 1$).
CCSS.MATH.CONTENT.K.OA.A.4	For any number from 1 to 9, find the number that makes 10 when added to the given number, e.g., by using objects or drawings, and record the answer with a drawing or equation.

CCSS.MATH.CONTENT.K.NBT.A. 1	Compose and decompose numbers from 11 to 19 into ten ones and some further ones, e.g., by using objects or drawings, and record each composition or decomposition by a drawing or equation (such as $18 = 10 + 8$); understand that these numbers are composed of ten ones and one, two, three, four, five, six, seven, eight, or nine ones.
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Based on *Common Core State Standards*

Whole Number Operations: Memorization

SKILLS INVENTORY	
Identifies the essential combinations of math facts in all four operations using the Montessori manipulatives leading to fluency.	
MONTESORI LESSON(S)	PURPOSE
ADDITION	
ADDITION SNAKE GAME - Counting the Snake - Two by Two - Addition Snake Game - Control of Error - Matching the 10s	- To give the first practice in memorization of the essential combinations in addition - To help the child experience the fact that no two quantities less than ten can make more than eighteen - To reinforce all of the possible combinations that make ten - It is another way for the child to check his own work.
ADDITION STRIP BOARD - Exploration - Using the Tables - Essential Combinations - How Many Ways? - The Commutative Law	- To guide the child through all of the possible essential combinations of addition in a systematic fashion. - To show that no essential combination exists beyond $9 + 9 = 18$ - Purpose for the red line on board: To show how quantities greater than 10 are divided into two sections - one section of ten and the second section leading toward another ten. - To reinforce the mechanism of addition helping the child to see and memorize the essential combinations of addition. - Using the control charts is how the child will check their work for all the following addition works. - To introduce the Commutative Law: the order of the addends does not affect the sum.
ADDITION CHART - Full - Commutative - Odd and Even - Blank	- Further memorization of the essential addition combinations. - To offer the possibility of repetition. - To focus the child's attention on the few combination he still needs to memorize, serving as a test of known facts.
SUBTRACTION	
SUBTRACTION SNAKE GAME - Counting the Snake - Control of Error - Two by Two	- To familiarize the child with all of the essential combinations in subtraction. - To offer the first step toward memorizing the essential combinations in subtraction. - Indirectly to prepare the child for algebra: Equal quantities of opposite signs cancel each other (this is not something we ever tell the children - it's just to give them some experience).
SUBTRACTION STRIP BOARD - Exploration - Essential Combinations - How Many Ways?	- To practice subtraction, leading to the memorization of the essential combinations in subtract - To show that subtraction is the opposite action of addition.
SUBTRACTION CHART - Practice - Blank	- Further exploration of the essential combinations in subtraction. - To offer the possibility of repetition. - To focus the child's attention on the few combinations that he still needs to memorize, and to serve as a test of known facts.
MULTIPLICATION	
MULTIPLICATION BEAD BARS Exploring the Tables	To familiarize the child with all of the essential combination in multiplication

- How Many Ways? - Multiplying by 10	- To show the geometric form of multiplication demonstrating that the multiplier is not a solid body - it merely indicates how many times a quantity is repeated - and a succession of lines creates a plane (surface). - Preparation for Division - helping the child visualize the divisibility of numbers. - Indirect preparation for algebra and geometry. - To introduce to the child that you just add a zero on the end of any number multiplied by 10
MULTIPLICATION BEAD BOARD	To practice multiplication leading to memorization of the essential combinations.
MULTIPLICATION CHART - Full - Commutative - Blank	- To further memorization of the essential combinations of multiplication. - To offer repetition. - To focus the child's attention on the few combinations she still needs to memorize and to offer a test of known facts.
DIVISION	
UNIT DIVISION BOARD - Exploration - Division from 81 - Finding Essential Combinations - Connection to Multiplication	- To familiarize the child with the various ways that quantities can be divided. - To show that not every quantity is evenly divisible, and to show that some quantities are divisible only by a few numbers. - To discover the essential combinations of division. - To practice division leading to the memorization of the essential combinations of division. - To see the relationship between multiplication and division.
DIVISION CHART - Practice - Blank	- To further memorize the essential combination in division. - To offer the possibility of repetition. - To focus the child's attention on the few combinations he still needs to memorize, serving as a test of known facts.
ASSESSMENT VOCABULARY	
add subtract	
ASSESSMENT CONSIDERATIONS	
Students will be asked to: - fluently add within 5 (K.OA.A.5) - fluently subtract within 5 (K.OA.A.5)	
DEVELOPMENTAL PROGRESSION	
There are no Head Start Early Learning Outcomes for Whole Number: Memorization in Primary.	
STANDARDS	
CCSS.MATH.CONTENT.K.OA.A.5	Fluently add and subtract within 5.

Based on *Common Core State Standards*

Fractions

SKILLS INVENTORY	
- Demonstrates understanding of the language of fractions (quantities <1) and the concept of fractions as the equal parts of a whole. - Performs all four operations with fractions using Montessori Manipulatives.	
MONTESORI LESSON(S)	PURPOSE
FOUNDATIONS AND EQUIVALENCE	
MAKING DESIGNS INTRODUCTION TO QUANTITY NAMING THE FRACTIONS (INTRODUCTION TO SYMBOLS) SUBSTITUTION (EQUIVALENCE)	- To give the child a beginning understanding of the nature of fractions. - To discover the relationships between fractions and whole numbers.
OPERATIONS (SENSORIAL)	
ADDITION SUBTRACTION MULTIPLICATION DIVISION	To give the child experience using the 4 operations with fractions.
ASSESSMENT VOCABULARY & ASSESSMENT CONSIDERATIONS	
These skills are not formally assessed in the Primary	
DEVELOPMENTAL PROGRESSION	
There are no Head Start Early Learning Outcomes for Fractions.	
STANDARDS	
There are no Kindergarten Standards for Fractions.	

Money

SKILLS INVENTORY	
Demonstrates understanding of money by identifying and naming coins (penny, nickel, dime, quarter) and counting the value of coins to \$1.00.	
MONTESORI LESSON(S)	PURPOSE
SORTING AND MATCHING MONEY COUNTING MONEY UP TO \$1.00	- To associate the names, shapes and colors of coins through muscular and visual memory - To classify objects into given categories, count the numbers of objects in each category and sort the category - To count the value of coins
ASSESSMENT VOCABULARY & ASSESSMENT CONSIDERATIONS	
These skills are not formally assessed in the Primary	
DEVELOPMENTAL PROGRESSION	
There are no Head Start Early Learning Outcomes for Money.	
STANDARDS	
There are no Kindergarten Standards for Money.	

Communication

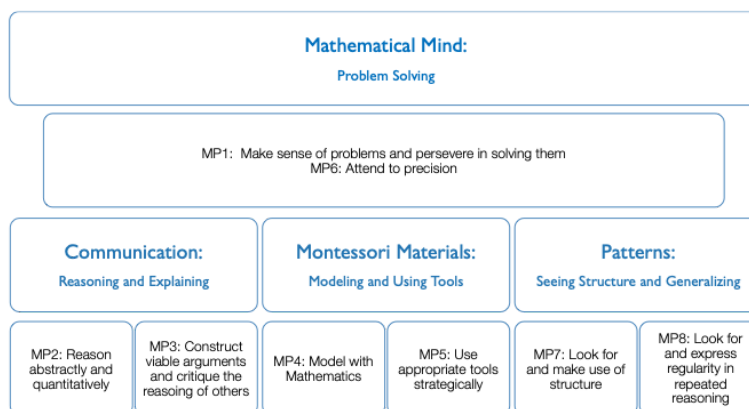
Reasoning and Explaining

Through collaboration, the Montessori math curriculum provides students with opportunities to explain their reasoning for their thinking and next steps.

SKILLS INVENTORY	
Demonstrates understanding of the Montessori math curriculum by explaining their own reasoning and responding to the reasoning of others.	
MONTESSORI LESSON(S)	
MATHEMATICS The child explores shape, size and numeration through the materials. PRACTICAL LIFE The order and sequence in the practical life exercises prepares the child to reason because they have developed an understanding that steps need to be taken in a particular order. SENSORIAL The sensorial materials provide children with abstractions. The purpose of the materials is to provide children with the abstraction of color, shape and size. These materials are referred to as “materialized abstractions”. LANGUAGE The names that are attached to the sensorial materials which allow the mind to hold the abstraction are given through language. Additionally, spoken language activities support mathematical thinking.	
HUMAN TENDENCIES	
Communication is supported by the Human Tendencies: • Exploration: the curiosity leading to explore and the desire to understand. • Communication: the ability for living beings to understand each other as well as to be understood.	
ASSESSMENT CONSIDERATIONS	
<u>Common Core Standards for Mathematical Practice</u> Students will be asked to: • explain thinking to others • respond to others’ thinking • participate in mathematical discussions involving questions like “How did you get that?” and “Why is that true?” <u>Examples:</u> • describe objects in the environment using names of shapes • describe the relative positions of objects (above, below, beside, in front of, behind, next to) • use informal language to describe similarities, differences and attributes of two- and three- dimensional shapes • describe measurable attributes of objects	
STANDARDS	
CCSS.MATH.PRACTICE.MP2	Reason abstractly and quantitatively.
CCSS.MATH.PRACTICE.MP3	Construct viable arguments and critique the reasoning of others.
Based on <i>Common Core Standards for Mathematical Practice</i>	
NOTES	

What are the Standards for Mathematical Practice:

The Standards for Mathematical Practice are 8 standards that allow students to understand and apply mathematics with confidence. These standards include problem solving, reasoning and explaining, modeling and using tools, and seeing patterns and structures.

Definitions:¹

Human Tendencies: A central tenet of Montessori philosophy is that human beings exhibit certain predispositions that are universal, spanning age, cultural and racial barriers; they have existed since the dawn of the species and are probably evolutionary in origin. 'Montessori stresses the need to serve those special traits that have proved to be tendencies of Man throughout his history.' (Mario Montessori, 1966, p. 21)

RESOURCES

Duffy, M., Axari, F., McDonough, S., & Shenk-Evans, W. (2014). *Math Works* (2nd ed.). Amsterdam University Press.

O'Connell, S., & SanGiovanni, J. (2013). *Putting the Practices Into Action: Implementing the Common Core Standards for Mathematical Practice, K-8* (Illustrated ed.). Heinemann.

Standards for Mathematical Practice | Common Core State Standards Initiative. (n.d.). Common Core State Standards Initiative. Retrieved April 15, 2021, from <http://www.corestandards.org/Math/Practice/>

¹ *Glossary of Montessori Terms.* (n.d.). Association Montessori Internationale. Retrieved April 15, 2021, from <https://montessori-ami.org/resource-library/facts/glossary-montessori-terms>

Mathematical Mind

Mathematical Thinking

The Montessori math curriculum was designed to develop the child's mathematical mind to think and reason with precision and logic. The Mathematical Mind, refers to the tendencies of the human mind for order, exactness, exploration, abstraction, manipulation and communication. The Montessori math curriculum also serves humans abilities to imagine, create, and think abstractly.

SKILLS INVENTORY
Identifies multiple ways to solve mathematical problems.
MONTESSORI LESSON(S)
MATHEMATICS The child explores shape, size and numeration through the materials. PRACTICAL LIFE The order and sequence in the practical life exercises prepares the child to reason because they have developed an understanding that steps need to be taken in a particular order. SENSORIAL The sensorial materials provide children with abstractions. The purpose of the materials is to provide children with the abstraction of color, shape and size. These materials are referred to as “materialized abstractions”. LANGUAGE The names that are attached to the sensorial materials which allow the mind to hold the abstraction are given through language. Additionally, spoken language activities support mathematical thinking.
HUMAN TENDENCIES
The Mathematical Mind is supported by the Human Tendencies: • Order: the understanding of one's surroundings as well as relationships, sequences or patterns • Exactness: the desire to be precise and constant so that things are objective • Abstraction: the ability to reason beyond the limits of the concrete as well as to generalize and interpret. This tendency will not develop in a child unless s/he has had enough concrete experience.
ASSESSMENT CONSIDERATIONS
<u>Common Core Standards for Mathematical Practice</u> Students will be asked to: • understand mathematics involves solving problems • try multiple strategies when problem solving • discuss how they solved problems • explain the meaning of a problem • explore ways to solve problems • use concrete objects or pictures to help them conceptualize and solve problems. • develop mathematical communication skills • use clear and precise language in discussions with others and in their own reasoning <u>Examples:</u> • solving addition word problems • solving subtraction word problems

STANDARDS	
CCSS.MATH.PRACTICE.MP1	Make sense of problems and persevere in solving them.
CCSS.MATH.PRACTICE.MP6	Attend to precision.

Based on *Common Core Standards for Mathematical Practice*

NOTES
<u>What are the Standards for Mathematical Practice:</u> The Standards for Mathematical Practice are 8 standards that allow students to understand and apply mathematics with confidence. These standards include problem solving, reasoning and explaining, modeling and using tools, and seeing patterns and structures. <u>Definitions:</u>¹ Mathematical Mind: All babies are born with mathematical minds, that is, they have a propensity to learn things which enhance their ability to be exact and orderly, to observe, compare, and classify. Humans naturally tend to calculate, measure, reason, abstract, imagine and create. But this vital part of intelligence must be given help and direction for it to develop and function. If mathematics is not part of the young child's experience, his subconscious mind will not be accepting of it at a later date. Human Tendencies: A central tenet of Montessori philosophy is that human beings exhibit certain predispositions that are universal, spanning age, cultural and racial barriers; they have existed since the dawn of the species and are probably evolutionary in origin. 'Montessori stresses the need to serve those special traits that have proved to be tendencies of Man throughout his history.' (Mario Montessori, 1966, p. 21)

RESOURCES
Duffy, M., Axari, F., McDonough, S., & Shenk-Evans, W. (2014). <i>Math Works</i> (2nd ed.). Amsterdam University Press. O'Connell, S., & SanGiovanni, J. (2013). <i>Putting the Practices Into Action: Implementing the Common Core Standards for Mathematical Practice, K-8</i> (Illustrated ed.). Heinemann. <i>Standards for Mathematical Practice Common Core State Standards Initiative.</i> (n.d.). Common Core State Standards Initiative. Retrieved April 15, 2021, from http://www.corestandards.org/Math/Practice/

¹ *Glossary of Montessori Terms.* (n.d.). Association Montessori Internationale. Retrieved April 15, 2021, from <https://montessori-ami.org/resource-library/facts/glossary-montessori-terms>

Montessori Materials

Modeling and Using Tools

Maria Montessori designed the math materials to incorporate the natural capabilities of a child's mathematical mind. Children are presented the materials and then given ample opportunity to explore the materials on the path towards abstraction.

The child's mathematical mind is fed by the three-dimensional, multi-sensory nature of the materials, the way he is able to handle and move them around, the discoveries he makes from that manipulation, the collaborative learning that he can engage through the materials, the self-correcting he can do under their guidance, and the geometric visualization he gets to reinforce his abstract understanding.¹

SKILLS INVENTORY
Represents math problems in multiple ways such as using Montessori materials, numbers, words, drawing pictures, acting out, making a chart or list or creating equations.
MONTESSORI LESSON(S)
MATHEMATICS The child explores shape, size and numeration through the materials. PRACTICAL LIFE The order and sequence in the practical life exercises prepares the child to reason because they have developed an understanding that steps need to be taken in a particular order. SENSORIAL The sensorial materials provide children with abstractions. The purpose of the materials is to provide children with the abstraction of color, shape and size. These materials are referred to as “materialized abstractions”. LANGUAGE The names that are attached to the sensorial materials which allow the mind to hold the abstraction are given through language. Additionally, spoken language activities support mathematical thinking.
HUMAN TENDENCIES
• Manipulation: the tendency to touch and to handle one's surroundings to give control over an activity. • Abstraction: the ability to reason beyond the limits of the concrete as well as to generalize and interpret. This tendency will not develop in a child unless s/he has had enough concrete experience. • Exploration: the curiosity leading to explore and the desire to understand.
ASSESSMENT CONSIDERATIONS
<u>Common Core Standards for Mathematical Practice</u> Students will be asked to: • experiment with representing problems in multiple ways by using Montessori materials, numbers, words, drawing pictures, acting out, making a chart or list, creating equations, etc. • connect different materials and/or representations and explain the connections • consider all available materials and representations when solving a mathematical problem • decide when certain materials or representations might be helpful • compare two materials and/or representations side-by-side • construct arguments using objects, pictures, drawings, and actions. <u>Examples:</u> • Montessori math materials • represent a problem by using:

¹ Duffy, M., Axari, F., McDonough, S., & Shenk-Evans, W. (2014). *Math Works* (2nd ed.). Amsterdam University Press, p. 45

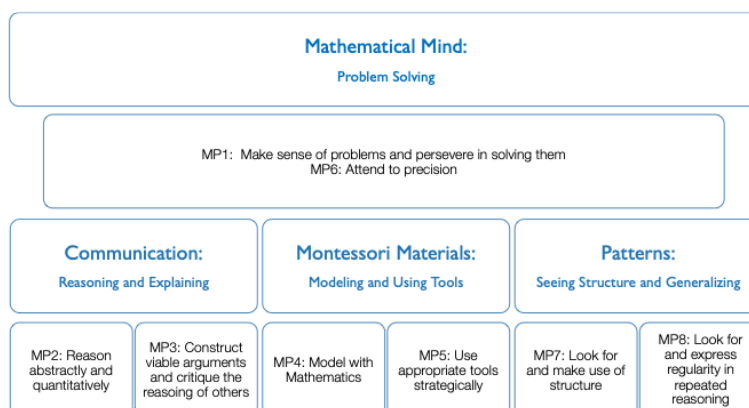
- objects
- fingers
- mental images
- drawings
- sounds (claps)
- acting out situations
- expressions
- equations
- model shapes in geometry with:
 - sticks
 - clay
 - drawings

STANDARDS

CCSS.MATH.PRACTICE.MP4	Model with mathematics.
CCSS.MATH.PRACTICE.MP5	Use appropriate tools strategically.

Based on *Common Core Standards for Mathematical Practice***NOTES**What are the Standards for Mathematical Practice:

The Standards for Mathematical Practice are 8 standards that allow students to understand and apply mathematics with confidence. These standards include problem solving, reasoning and explaining, modeling and using tools, and seeing patterns and structures.

Definitions:²

Human Tendencies: A central tenet of Montessori philosophy is that human beings exhibit certain predispositions that are universal, spanning age, cultural and racial barriers; they have existed since the dawn of the species and are probably evolutionary in origin. 'Montessori stresses the need to serve those special traits that have proved to be tendencies of Man throughout his history.' (Mario Montessori, 1966, p. 21)

Sensorial Materials: The sensorial materials were created to help young children in the process of creating and organising their intelligence. Each scientifically designed material isolates a quality found in the world such as colour, size, shape, etc. and this isolation focuses the attention on this one aspect. The child, through repeated manipulation of these objects, comes to form clear ideas or abstractions. What could not be explained by words, the child learns by experience working with the sensorial materials.

RESOURCES

² *Glossary of Montessori Terms*. (n.d.). Association Montessori Internationale. Retrieved April 15, 2021, from <https://montessori-ami.org/resource-library/facts/glossary-montessori-terms>

Duffy, M., Axari, F., McDonough, S., & Shenk-Evans, W. (2014). *Math Works* (2nd ed.). Amsterdam University Press.

O'Connell, S., & SanGiovanni, J. (2013). *Putting the Practices Into Action: Implementing the Common Core Standards for Mathematical Practice, K-8* (Illustrated ed.). Heinemann.

Standards for Mathematical Practice | Common Core State Standards Initiative. (n.d.). Common Core State Standards Initiative. Retrieved April 15, 2021, from <http://www.corestandards.org/Math/Practice/>

Patterns

Seeing Structures and Generalizing

The human mind is attracted to patterns and structure. There are many examples of patterns and structures found throughout the Montessori math materials. For example: consistency of colors (green, blue, red; bead bars) used in the materials, scaled sizes and shapes of the materials, tens & teens boards, hundreds board, fraction circles

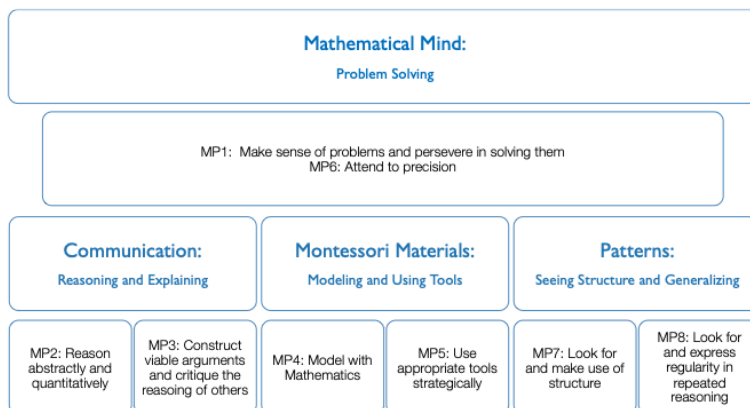
SKILLS INVENTORY	
Identifies patterns that exist in mathematics and/or with the Montessori materials.	
MONTESSORI LESSON(S)	
MATHEMATICS The child explores shape, size and numeration through the materials. PRACTICAL LIFE The order and sequence in the practical life exercises prepares the child to reason because they have developed an understanding that steps need to be taken in a particular order. SENSORIAL The sensorial materials provide children with abstractions. The purpose of the materials is to provide children with the abstraction of color, shape and size. These materials are referred to as “materialized abstractions”. LANGUAGE The names that are attached to the sensorial materials which allow the mind to hold the abstraction are given through language. Additionally, spoken language activities support mathematical thinking.	
HUMAN TENDENCIES	
Patterns are supported by the Human Tendencies: • Order: the understanding of one’s surroundings as well as relationships, sequences or patterns	
ASSESSMENT CONSIDERATIONS	
<u>Common Core Standards for Mathematical Practice</u> Students will be asked to: • notice a pattern or structure • notice repetitive actions in counting and computation • check their work by asking themselves, “Does this make sense?” <u>Examples:</u> • Montessori material color patterns • recognize the pattern that exists in the teen numbers the number starts with one ten and ends with the digit that is first stated • recognize $3 + 2$ and $2 + 3$ equal 5. • recognize that the next number in a counting sequence is “one more”	
STANDARDS	
CCSS.MATH.PRACTICE.MP7	Look for and make use of structure.
CCSS.MATH.PRACTICE.MP8	Look for and express regularity in repeated reasoning.

Based on *Common Core Standards for Mathematical Practice*

NOTES

What are the Standards for Mathematical Practice:

The Standards for Mathematical Practice are 8 standards that allow students to understand and apply mathematics with confidence. These standards include problem solving, reasoning and explaining, modeling and using tools, and seeing patterns and structures.

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	Monday	Tuesday	Wednesday	Thursday	Friday
8:00 am	Teachers on-site and in their classrooms preparing for the day. This time may also be used for meeting with parents and/or conferencing between the lead teacher and classroom assistant as to the plan for the day and any special needs they have noticed for the class or individual students.				
8:30 am	Morning Work cycle Teachers give lessons while students attend or pursue work of their own choosing. Teachers circulate, check in, and support during this time. During this time, some students will prepare snack and students may partake in turns throughout the morning. Specials During the morning work cycle, students will work with specialist teachers by age-group or interest, staying at each area for at least a 30-minute period of focused work or activity. Teachers will track students' attendance at co-curricular offerings to ensure that every student attends at least one visual art, performing art, and PE session per week so that all students are exposed to all areas.				
11:30 am	Whole-class meeting for community time and announcements, read-alouds, songs, discussions that call on critical thinking skills, etc.				
12:00 pm	Lunch and gross motor time (outdoor play, weather permitting, or gym) allowing for 30 minutes or more of physical activity for all students. These periods will be staggered to efficiently manage lunchroom and outdoor resources.				
1:00pm	Afternoon work cycle Teachers give lessons while students attend or pursue work of their own choosing. Teachers circulate, check in, and support during this time as well. At the end of the work cycle, students will tidy the classroom and participate in an orderly dismissal.				Available for specials
3:00pm	Dismissal				

Foundations: Great Story			
Skills Inventory			
Lower Elementary			
Listens to stories about significant historical changes and is inspired to gather additional information to clarify or deepen understanding.			
Upper Elementary			
	Initial Series	Middle Series	Later Series
Great Story			

Sun and Earth: Earth's Systems			
Skills Inventory			
Lower Elementary			
Identifies the Earth’s layers and their relative sizes and describes the functions of the Earth’s layers. Understands how tectonic processes impact the Earth and that geologic events can happen very quickly or very slowly.			
Upper Elementary			
Understands how Earth’s major systems (geosphere, hydrosphere, biosphere) interact to affect Earth’s surface materials and processes. Identifies patterns that occur (rock layers, mountain ranges, ocean floor structures and trenches, earthquakes, volcanos).			
Explains how living things and natural hazards impact land, water, air, and outer-space and the steps that can be taken to reduce these impacts.			
Identifies natural hazards that result from natural processes, how they impact people living in a place, and steps that can be taken to reduce their impacts.			
	Initial Series	Middle Series	Later Series
Earth's Layers			
	Layers of Earth		
	Functions of Earth's Layers		
	Relative Size of Earth's Layers		
Further Study of Earths' Layers			
		Plate Tectonics	
		Continental Drift	
		Isostatic Balance	
		Mountain Formation	
		Hot Spots	
		Earthquakes	
		Tsunamis	
		Geysers	
Rock Formations			
			Igneous
			Sedimentary
			Metamorphic
			Rock Cycle

Sun and Earth: Sun and Earth			
Skills Inventory			
Lower Elementary			
Understands the patterns of rotation and revolution of the sun, moon, Earth, and other planets and how this influences light and darkness as well as temperature.			
Upper Elementary			
Identifies the observable patterns caused by the orbit of Earth around the sun, the orbit of the moon around Earth, the rotation of the Earth and the different positions of the sun, the moon, and stars at different times of the day, month, and year.			
	Initial Series	Middle Series	Later Series

Introductory Concepts

- Relative Proportion of the Sun and the Earth
- Rotation of the Planets and Centrifugal Force
- The Sun’s Energy

Planets of the Solar System

- Using Nomenclature Materials
- Interplanetary Distances
- Planetary Disks

Earth's Movements

- Parts of the Day
- Hottest and Coldest Parts of the Day
- Work Chart for Time Zones
- Work Chart for Time Zones - Global Sunrise and Sunset
- Lines of Latitude and Longitude
- The International Date Line (The Story of Ferdinand Magellan)

Earth is a Sphere

- Sun’s Rays Strike at Different Angles
- Perpendicular Rays are More Concentrated than Non- Perpendicular Rays
- Perpendicular Rays Lose Less Energy to the Atmosphere

The Seasons

- Unequal Day and Night
- There is a 24 Hour Day/Night at the Poles
- Unequal Day and Night Causes Seasons
- Solstices and Equinoxes
- Dates of the Solstices and Equinoxes and the Length of the Seasons
- Tilt of the Axis of the Earth
- Temperature Zones

Work Charts

- Temperature Zones
- Temperature Variation in Zones

Work of Air

Skills Inventory

Lower Elementary

- Identifies the properties of air and understands that wind changes the shape of land by breaking apart rocks, soils, and sediments into smaller particles and moving them.
- Understands the concept of climate and how scientists record weather patterns to predict future weather.

Upper Elementary

- Understands how winds and clouds in the atmosphere interact with landforms to determine weather patterns.
- Understands the interrelationship of winds and landforms to determine patterns of weather.
- Understands the concept of climate and how scientists record weather patterns to predict future weather.

Initial Series

Middle Series

Later Series

Prelude to the Winds

- Air Occupies Space
- Warmer Air Moves Upward

Earth Science

Natural Disasters

Human Impacts

Natural Disasters

By Waves
By Ice

The Water Cycle

Saltwater and Freshwater

Impact on Living Things

Climate

Natural Disasters

Human Impacts on Climate

Matter and Laws			
Skills Inventory			
Lower Elementary			
Demonstrates understanding that different types of matter exist and that temperature impacts matter in different ways.			
Upper Elementary			
Demonstrates understanding that matter can be subdivided into particles that are too small to be seen, that the mixture of two or more different substances may produce a new substance.			
	Initial Series	Middle Series	Later Series
Different Ways of Combining	Combining		
	Mixture		
	Suspension		
	Solution		
	Chemical Change		
	Color Change		
	Gas Produced		
	Precipitate		
	Temperature Change		
	Light Emitted		
	Separating		
	Chemical Compound		
	Saturation and Crystallization		
	Saturated Solution		
	Supersaturated Solution		
States of Matter	Crystallization		
	Solids		
	Model		
	Properties		
	Liquids		
	Model		
	Properties		
	Liquids Take the Shape of their Container		
	Gases		
	Model		
	Properties		
	Gases Move in all Directions		
	Which Way Do They Push?		
	Solids Push Down		
	Liquids Push Sideways and Down		
	Gases can Push Upwards		
	Attraction and Gravity		
	Idea of Gravity		
	Liquids Settle According to their Weight		

With Movement, Different Materials Arrange Themselves According to their Weight

Magnetic Forces

Further States of Matter

Temperature Affects the State of Matter (extended)

Liquids

Fluid, Viscous

Temperature Affects Viscosity

Solids

Rigid, Elastic, Plastic

Solids can be Rigid or Elastic

Depending on Length

Depending on Thickness

Depending on Weight Applied

Depending on Location of Weight

Atoms and Molecules

Atoms

Molecules

Density

Light and Sound

Skills Inventory

Lower Elementary

Demonstrates understanding that sound makes matter vibrate and vibrating matter can make sound.

Demonstrates understanding that objects can be seen when they are illuminated and the effect of placing objects of different materials in the path of a beam of light.

Identifies ways in which light and sound are used to communicate over a distance.

Upper Elementary

Relates waves in water with light and sound waves, identifies amplitude and wavelength and how technology uses these patterns to transfer information.

Initial Series

Middle Series

Later Series

Light and Sound Waves

Light

Sound Waves

Amplitude and Wavelength

Amplitude and Wavelength

Digitized Information

Communication with Light and Sound

Digitized Information

Forces and Interactions

Skills Inventory

Lower Elementary

Demonstrates understanding of how forces and motions impact an object and the types of interactions between objects with different properties.

Initial Series

Middle Series

Later Series

Force

Force

Motion Patterns

	Motion Patterns
Relationship between Objects	Relationship between Objects
Electric and Magnetic Forces	Electric and Magnetic Forces

Energy

Skills Inventory		
Upper Elementary		
Demonstrates understanding that energy can be transferred from place to place by sound, light, heat, and electric currents.		
Demonstrates understanding relating to the speed of an object to the energy of that object and how energy changes when objects collide.		
	Initial Series	Later Series
Energy		Energy
Speed		Speed
Transfer		Transfer
Electrical Currents		Electrical Currents
Natural Energy Sources		Natural Energy Sources

Great Story: The Coming of Life			
Skills Inventory			
Lower Elementary			
Listens to stories about significant historical changes and is inspired to gather additional information to clarify or deepen understanding.			
	Initial Series	Middle Series	Later Series
	Great Story: The Coming of Life		
Timeline of Life			
Skills Inventory			
Lower Elementary			
Understands the history of life on earth and the variety of organisms that existed on land and in the water.			
Upper Elementary			
Understands that some organisms are no longer found on earth and that fossils provide evidence of different types of organisms and their environments.			
	Initial Series	Middle Series	Later Series
Timeline of Life			
	Introduction		
	The Blank Timeline of Life		
	The Timeline of Life: Further Details		
	Following up on The Timeline of Life		
Botany			
Skills Inventory			
Lower Elementary			
Identifies the parts of plants (root, stem, leaf, flower, fruit) and how they help the plant survive and grow. Understands the needs of plants including different types of pollination.			
Upper Elementary			
Identifies the internal and external structures of plants and how they serve the functions of growth, survival, behavior, and reproduction.			
	Initial Series	Middle Series	Later Series
The Plant			
	The Story of the Plant		
	Plants		
	Parts of a Plant		
	Needs of Plants I		
	Needs of Plants II		
The Leaf			
	The Leaf as a Food Factory		
	Plants Grow Toward Light		
	Leaves of a Plant Arrange Themselves to Get the Light		
	Leaves of Plants Sometimes Need Help to Reach the Light		
	Plants Release Oxygen		
	Leaves Get Rid of Extra Water		
		External Parts of the Leaf	
		Venation Patterns	
		Arrangement of Leaves on the Stem	
		Attachment of Leaf to Stem	

		Simple and Compound leaves Leaf Margins Leaf Shapes Specialized Leaves
The Root	Roots Take up Water for the Plant Roots Secure Plants to the Ground Roots Keep Soil in Place Leaves and Plants Shape Help the Roots	
		Parts of the Root Tip Types of Root Systems Specialized Roots
The Stem	Stems Hold the Leaves up to the Light Stems Carry Water from the Roots and Food from the Leaves Stems Extend into the Leaves as Veins Geotropism The plant and its Reproductive Parts	
		Parts of a Woody Stem Buds on the Stem Attachment of Buds on a Stem Types of Stems Types of Aerial Stems Specialized Stems
The Flower	The Story of the Flower Parts of the Flower How Plants Ensure Pollination Position of the Ovary	
		Position of the Ovary Complete and Incomplete Flowers Perfect and Imperfect Flowers Variations in the Parts of the Flower
The Fruit	Parts of the Fruit Function of the Fruit	
		Variations in the Ovary Fleshy and Dry Fruits Types of Dry Fruits Types of Fleshy Fruits
The Seed	The Story of the Seed Parts of the Seed Seed Dispersal	

Plant Classification	Monocotyledons and Dicotyledons		
	Introduction to the Plant Classification System		
	Text and Picture Cards		
	Classification of Plants Using the Plant Classification Material		
			Dichotomous Key
Zoology			
Skills Inventory			
Lower Elementary			
Identifies how different animals use their body parts in different ways to see, hear, grasp objects, protect themselves, move from place to place, and seek, find, and take in food, water, and air. Understands that reproduction is essential to the continued existence of every kind of animal.			
Understands the impact that the environment has on animals and the impact that animals have upon their environments.			
Upper Elementary			
Identifies the internal and external structures of animals that serve various functions in growth, survival, behavior, and reproduction. Understands the importance of the brain in processing information from different sense receptors and how animals use this information and memories to guide their actions.			
	Initial Series	Middle Series	Later Series
Animal Stories			
	Local Animal		
	What Do Animals Eat?		
Question and Answer Game			
	Study of a Single Animal		
	Study of a Single Question		
Body Functions of Vertebrates			
	Introduction to the Five Classes		
	Learning Characteristics: Complete Text		
	Learning Characteristics: Incomplete Text		
	Comparing Classes		
	Naming the Body Functions		
Classification of Animals			
	Introduction to Animal Classification		
	Introduction to Text and Picture Cards		
	Classification of Animals Using Folders and Circles		

The Human Body			
Skills Inventory			
Lower Elementary			
Identifies how humans use their body parts in different ways to see, hear, grasp objects, protect themselves, move from place to place, and seek, find, and take in food, water, and air.			
Understands that humans have body parts that capture and convey different kinds of information needed for growth and survival including that reproduction is essential to the continued existence of humans.			
Upper Elementary			
Identifies the internal and external structures of humans that serve various functions in growth, survival, behavior, and reproduction.			
	Initial Series	Middle Series	Later Series
Senses			
	The Great River		
	Humans are Mammals		
	Cells		

Body Systems	Sight	
	Hearing	
	Smell	
	Taste	
	Touch	
	Digestive System	
	Circulatory System	
	Respiratory System	
	Muscular System	
	Nervous System	

Ecology

Skills Inventory		
Upper Elementary		
Understands that a healthy ecosystem is one in which multiple types of different species are able to meet their needs in a stable web of life in which matter cycles between the air and soil and among plants, animals, and microbes as organisms live and die.		
Initial Series	Middle Series	Later Series
Basic Needs of Living Things	Natural Resources	From Biosphere to atoms
Adaptations of Living Things	Introductory Biome Studies	Characteristics of Biomes
Seasons		Ecosystems: Trophic Levels and Food Chains
		Matter Cycles
		Energy Flows
		Communities: Niches and Keystone Species
		Communities through Time: Succession
		Communities: Interactions between Species
		Populations: Snowy owls and Lemmings
		Organisms: A mouse and A mutation
		The Ocean Ecosystem
		Chart of Interdependencies

Evolution

Skills Inventory		
Upper Elementary		
Understands that when an environment changes (temperature, availability of resources) some organisms survive and reproduce, others move to new locations, others move into the transformed environment, and some do not survive, while recognizing that the differences in characteristics between individuals of the same species provide advantages in surviving, finding mates, and reproducing.		
Initial Series	Middle Series	Later Series
		Darwin’s Theory
		Mechanisms of Evolution
		Building the Tree of Life
		The First Mammals
		The End of the Dinosaurs

Great Story: The Coming of Human Beings				
Skills Inventory				
Lower Elementary				
Listens to stories about significant historical changes and is inspired to gather additional information to clarify or deepen understanding.				
Initial Series		Middle Series		Later Series
Great Story: The Coming of Human Beings				
Natural History				
Skills Inventory				
Lower Elementary				
Uses a chronological sequence of multiple events to compare periods of time starting with the creation of the Universe.				
Initial Series		Middle Series		Later Series
Black Strip				
Clock of Eons/ Eras				
Human Life on Earth				
Skills Inventory				
Lower Elementary				
Understands how weather, climate, and other environmental characteristics affect people’s lives in a place or region as well as how human activities affect the cultural characteristics, and the economic activities found there, and how a place or region changes over time.				
Upper Elementary				
Understands how environmental and cultural characteristics influence population distribution in specific places or regions as well as the movement and settlements of people, goods, and ideas including the impacts of catastrophic environmental and technological events on human settlements and migration.				
Initial Series		Middle Series		Later Series
Significance of the Appearance of Human Beings				
Introduction				
Further Study				
First Timeline of Human Beings				
Introduction				
Further Study				
Second Timeline of Human Beings				
Early Humans				
The Human Journey				
Hand Timeline				
Fundamental Needs of Human Beings				
Chart 1				
Chart 2				
Research Using the Charts				
		Three Phases of History		
				Civilizations
				Sumer
				Egypt
				Indus Valley
				Yellow River (Hwang-Ho)
				Aztec

	Government	
World History—Western Hemisphere		Early Societies and Civilizations Exploration Geography Government Economics
World History—Eastern Hemisphere		Geography Early Societies and Civilizations World Religions Government Economics

Keys for Exploration

Skills Inventory			
Lower Elementary			
Understands how to create a chronological sequence of multiple events using a timeline.			
Understands how to use historical sources to answer questions about historical individuals, groups, and/or events.			
Upper Elementary			
Understands how to create and use a chronological sequence (timeline) of to compare events that happened at the same time.			
Understands how to use historical sources to answer questions about historical individuals, groups, and/or events and uses information about a historical source (the maker, date, place of origin, intended audience, and purpose) to judge the extent to which the source is useful for studying a particular topic.			
	Initial Series	Middle Series	Later Series
The History Question Charts			
	Introduction Research	Research	Research
Making a Timeline			
	Making a Timeline	Making a Timeline	Making a Timeline
BCE/CE Timeline			
	Introduction of the Timeline The Cards of Fundamental Human Need	The Cards of Fundamental Human Need	The Cards of Fundamental Human Need

Geography / Globes and Maps

Skills Inventory			
Lower Elementary			
Uses globes, maps, and geographic models to identify major geographic features (continents, oceans, rivers, lakes, mountains) and major political locations (countries, cities, capitals).			
Upper Elementary			
Expands on use of globes, maps, and geographic models to identify geographic features (continents, oceans, rivers, lakes, mountains) and political locations (countries, cities, capitals).			
	Initial Series	Middle Series	Later Series
	Globes and Maps Elementary Land and Water Forms Puzzle Maps (extension from Primary)	Making Models of Geographic Features	

- Geographic Names
- Outline Maps
- Pin Maps

Time

Skills Inventory

Lower Elementary

Understands why and how humans measure time and the origins of the names of days of the week and months of the year.

Creates and uses a chronological sequence such as a timeline.

Upper Elementary

Understands the patterns of daily changes in length and direction of shadows, day and night, and the seasonal appearance of some stars in the night sky.

Initial Series

The Story of Time

The Calendar

Days of the Week

Origins of the Names of the Days of the Week

Months of the Year

Origins of the Names of the Months of the Year

Clock Time

My Day

My Family Timeline

Middle Series

Later Series

Economics

Skills Inventory

Lower Elementary

Understands that people make economic choices as producers and consumers of goods and services based on their economic wants and needs as well as their resources to obtain them.

Understands that a community requires the interdependence of many people performing a variety of jobs and services to provide basic needs and wants and that each community develops an economic system that addresses three questions: what will be produced, how will it be produced, and who will get what is produced?

Upper Elementary

Understands how economic activities in the student’s own state and the United States have varied and changed over time, with improvements in transportation and technology.

Understands how many countries of the Western Hemisphere trade with each other, as well as with other countries around the world to meet the needs and wants of the people who live there.

Understands how migration (westward movement) and immigration have impacted economic activities.

Understands how trade networks promoted the exchange and diffusion of language, belief systems, tools, intellectual ideas, inventions, and diseases.

Initial Series

Scarcity

Costs and Benefits

Goods and Services

Consumers and Producers

Banks

Saving and Borrowing

Middle Series

Later Series

Economics

- What is Produced and Where?
- How Much is Produced?

Human Interdependencies	How Much Do We Consume?			
	Comparison of Consumption and Production			
	World Trade			
	Trade Balance and the Flow of Money			
	Costs and Benefits			
	Positive and Negative Incentives			
	Resources			
	Trade			
	Money			
	Investment			
Human Interdependencies	Profits			
	Financial Institutions			
	Interest Rates			
	Inflation & Deflation			
	Unemployment			
	Goods and Services			
	Human Capital			
	Economic Interdependence			
	Where do we Get our Food?			
	What does the Farmer Produce?			
Human Interdependencies	Who Depends on the Farmer?			
	Who does the Farmer Need?			
	The Flow of Goods			
	The Collection Bowl			

Civics			
Skills Inventory			
Lower Elementary			
Understands that citizens are members of a community or group that have rules and laws to protect the rights and define the responsibilities of individuals and groups and that citizens contribute to a community’s government through leadership and service.			
Understands that the United States is founded on the principles of democracy and there are different forms of government around the world that affect the role of citizens within those communities.			
Identifies the concept of universal human rights, which suggests that all people should be treated fairly and should have the opportunity to meet their basic needs.			
Upper Elementary			
Understands how the student’s own states’ and United States’ governments protect the rights of citizens and promote the common good by establishing rights, freedoms, and responsibilities for its citizens.			
Understands that as societies and civilizations change over time, their political and economic structures evolve.			
Understands that the political systems of the Western Hemisphere and the Eastern Hemisphere vary in structure and organization across time and place.			
	Initial Series	Middle Series	Later Series
Political Institutions	Political Institutions	Political Institutions	Political Institutions
Civic Life	Civic Life	Civic Life	Civic Life
Processes, Rules, and Laws	Processes, Rules, and Laws	Processes, Rules, and Laws	Processes, Rules, and Laws

Foundations: Impressionistic Stories of Language Arts			
Skills Inventory			
Lower Elementary:			
Listens to stories about significant historical changes and is inspired to gather additional information to clarify or deepen understanding.			
	Initial Series	Middle Series	Later Series
Great Story	Great Story: The Story of Communication in Signs		
History of Spoken Language	The Story of the First Word		
	History of the Children’s Own Languages		
Story of Writing	Story of the Piece of Paper that Could Talk		
History of Written Language	History of Written Language		

Foundations: Mechanics of Reading and Writing			
Skills Inventory			
Lower Elementary			
Demonstrates understanding about letters, letter-sound correspondences (phonetics, phonograms, puzzle words), word analysis skills and syllabication patterns when decoding words.			
Reads grade-level texts with accuracy, appropriate rate, expression and fluency to support comprehension while using context to confirm or self-correct for word recognition and understanding.			
Upper Elementary			
Uses combined knowledge of phonics and word analysis skills (letter-sound correspondences, syllabication patterns, and morphology) to accurately read unfamiliar multisyllabic words in context and out of context.			
Reads grade-level texts with accuracy, appropriate rate, expression and fluency to support comprehension while using context to confirm or self-correct for word recognition and understanding.			
	Initial Series	Middle Series	Later Series
Phonological and Phonemic Awareness	Elkonin Boxes		
	Multisensory Activities for Training Phonological Awareness		
Alphabetic Principle	Alphabet Sounds: Print & Cursive		
	Letter Names		
	Sound - Letter Correspondence Practice (Auditory, Visual, Blending Drills)		
Phonics	Blending to Form Phonetic Words		
	Reading Phonetic Words		
	Phonograms		
	Silent ‘e’		
	Teaching High Frequency Words (Puzzle Words)		
	Alternative Sounds for Letters and Phonograms		
	Syllabication		
	Types of Syllables		
Reading Fluency	Reading Phrases and Sentences		
	Reading Schemes/ Phonetic Readers		
	Labeling the Environment		
	Choral Reading		
Handwriting	Cursive Writing		
	Letter formation - Initial Stroke		

Fluent Reading Activities	Joining letters		
	Writing capital letters		
	Calligraphy and Lettering		
		Books	Books
		Grammar Boxes	
		Language Command Cards	
		Interpretive Reading Cards	Interpretive Reading Cards
		Research	Research
Spoken Language: Collaborative Discussions			

Skills Inventory			
Lower Elementary			
Engages in collaborative discussions by preparing, following class rules for discussions, asking questions, staying on topic, explaining ideas and linking comments to the remarks of others.			
Upper Elementary			
Engages in collaborative discussions by preparing, following rules for collegial discussions, posing and responding to questions with elaboration and details, citing evidence, probing and reflecting on others’ ideas and demonstrating understanding of different perspectives.			
	Initial Series	Middle Series	Later Series
Collaborative Discussions	One-on-One	One-on-One	One-on-One
	Whole Class	Whole Class	Whole Class
	Small Group	Small Group	Small Group
	Large Group	Large Group	Large Group
	Teacher Led	Teacher Led	Teacher Led
Rules for Discussions	Rules for Discussions: Rules and Skills for Effective communication	Rules for Discussions: Rules and Skills for Effective communication	Rules for Discussions: Rules and Skills for Effective communication
	Gain the floor in respectful ways.	Gain the floor in respectful ways.	
	Listen to others with care.	Listen to others with care.	
	Speak one at a time about the topics and texts under discussion.	Speak one at a time about the topics and texts under discussion.	
		Come to discussions prepared, having read or studied required material.	Come to discussions prepared, having read or studied required material.
			Define individual roles as needed.
			Set specific goals and deadlines.
Comments and Questioning	Make comments that:	Make comments that contribute to the discussion.	Make comments that contribute to the discussion.
	build on others’ ideas.	build on others’ ideas.	build on others’ ideas.
	express own ideas clearly.	express own ideas clearly.	express own ideas clearly.
		use background knowledge about the topic to explore ideas under discussion.	elaborate on the remarks of others.
			use background knowledge about the topic to explore ideas under discussion.
	Ask questions:	Ask questions:	
	to clear up confusion or for clarification	to check understanding	
	for further explanation	to link comments to the remarks of others	

		Pose and respond to questions: to clarify for follow up on information Draw on discussion preparation.	Pose and respond to specific questions Draw on discussion preparation.
Drawing Conclusions		Drawing Conculsions Inferencing Explain ideas and understanding Key Ideas	Drawing Conculsions Inferencing Key ideas Conclusions Multiple Perspectives reflection paraphrasing

Spoken Language: Presentation and Delivery

Skills Inventory
Lower Elementary

Engages in a variety of presentations using skills such as speaking in complete sentences, adequate volume, clear pronunciation and understandable pace. Includes multimedia components such as visual displays or audio recordings.
Upper Elementary

Engages in a variety of presentations using skills such as formal English, adequate volume, clear pronunciation and understandable pace. Includes multimedia components such as visual displays, graphics, images, music, sound or audio recordings.

	Initial Series	Middle Series	Later Series
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Presentation Skills	Oral Reports Speeches Poetry Songs Drama Debates	Oral Reports Speeches Poetry Songs Drama Debates	Oral Reports Speeches Poetry Songs Drama Debates
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Content	People, Places, Things Events describe in detail express ideas express feelings Facts and Detals tell story recount experience	Facts and Detals tell story recount experience support main idea support themes Sequence ideas logically Report on topic Report on text	Sequence ideas logically Report on topic Report on text
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Multimedia Components			Present an Opinion
			Present claims and findings
			Main Idea or Theme
			descriptions
			facts
Delivery			details
	Visual Displays	Visual Displays	Visual Displays
	Audio Recordings	Audio Recordings	Audio Recordings
	Drawings		
			Graphics
			Images
			Music
			Sound
	Formal English	Effective Presentation Delivery	Effective Presentation Delivery
	Volume	Formal English	Formal English
			Volume
			Pronunciation
			Pace
			Eye Contact

Grammar: Parts of Speech

Skills Inventory

Lower Elementary

Through sensorial work, identify the nine parts of speech (noun, article, adjective, verb, preposition, adverb, pronoun, conjunction, interjection), explain their functions in sentences and use them accurately when speaking and with grade-level accuracy when writing.

Upper Elementary

Identify the nine parts of speech (noun, article, adjective, verb, preposition, adverb, pronoun, conjunction, interjection), explain their functions in sentences and use them accurately when writing or speaking.

	Initial Series	Middle Series	Later Series
Noun	Oral Introduction		
	Names are Very Old		
	Everything has a Name		
	Noun Name and Symbol		
	List of Nouns		
	Numer of the Noun	Numer of the Noun	
	Singular	Singular	
	Plural	Plural	
	Gender of the Noun		
	Masculine		
	Feminine		
	Common		

	Neutral		
	Article and Noun Agreement		
	Classification of the Noun	Classification of the Noun	
	Proper and Common Nouns		
	Possessive Nouns		
	Collective Nouns		
		Concrete, Abstract and Spiritual Nouns	
		Classification Work Chart	
		Composed Grammar Symbols	
		Proper and Common Nouns	
		Concrete, Abstract and Spiritual Nouns	
		Collective Nouns	
Article			
	Oral Introduction		
	Grammar Box		
	Definite/ Indefinite Article		
Adjective			
	Oral Introduction		
	Adjective Grammar Box		
	Impressionistic Chart of Noun Family		
	Adjective Command Cards		
	Vocabulary		
		Transposition	
		Degrees	
		Positive	
		Comparative	
		Superlative	
		Classifcation of Adjectives	
		Types of Adjectives	
		Descriptive	
		Quantitative	
		Demonstrative	
		Distributive	
		Possessive	
		Interrogative	
		Proper	
		Spelling Changes	
Verb			
	Oral Introduction		
	Verb Grammar Box		
	Impressionistic Chart of Noun Family and Verb		
	Verb Command Cards		Verb Command Cards
	Verb Conjugation	Verb Conjugation	Verb Conjugation

Pronoun

- Oral Introduction
- Pronoun Grammar Boxes
- Pronoun Command Cards
- Pronoun Charts 1 and 2
- Types of Pronouns
 - Personal
 - Possessive
 - Indefinite
 - Reflexive

- Degrees
- Place
- Time
- The Chart of Gears and the Study of the Adverb

Types of Pronouns

- Relative
- Interrogative
- Transposition
- Antecedents of Pronouns
 - Nominative to Objective
 - Nominative to Possessive
 - Demonstrative, Numeral, and Indefinite Pronouns

Transposition

- Personal Pronouns
- Declension of Pronouns

Conjunction

- Oral Introduction
- Conjunction Grammar Boxes
- Conjunction Command Cards
- Vocabulary

- Transposition
- Types of Conjunctions
 - Coordinating
 - Subordinating

Transposition

Correlative

Interjection

- Oral Introduction
- Interjection Grammar Box

Transposition

Grammar: Logical Analysis

Skills Inventory

Lower Elementary

Analyzes simple sentences to identify the functions of the parts of a sentence (subject, predicate, direct object, indirect object , attributive, appositive and adverbial) and writes sentences which include all parts.

Upper Elementary

Analyzes simple, compound and complex sentences to identify the functions of the parts of a sentence according to dependency (independent clause, dependent clause) and type (main/principal clause, adjectival clauses, adverbial clauses, noun clauses used as a subject, object or indirect object) and writes sentences which include all parts, including clauses.

Initial Series

Middle Series

Later Series

Simple Sentence Analysis

- Circle and Arrow Material
- Subject and Predicate
- Subject, Predicate, Direct Object
- Compound Subject
- Compound Predicate
- Compound Direct Object
- Indirect Object

Circle and Arrow Material

- Attributives
- Appositives
- Adverbial Modifiers
- Direct Address
- Elliptical Constructions
- Inverted Word Order
- Personal Pronouns
- Linking Verbs
- Participles
- Infinitives
- Gerunds

Clause Analysis

Chart A: Analysis of Simple Sentences with Action Verb
Grammar Symbols and Logical Analysis Comparison
Paper Only: Writing Analysis

- Circle and Arrow Material and Charts
- Compound Sentences
- Complex Sentences
- Phrases and Clauses
- Identifying the Principal and Dependent Clauses
- Noun Clauses: Direct Object
- Noun Clauses: Indirect Object
- Adverbial Clauses
- Incidental Clauses
- Chart B: Analysis of Clauses in Complex Sentences
- Chart C: Dependencies of Clauses
- Writing the Analysis on Paper

Word Study

Skills Inventory

Lower Elementary

Uses knowledge of words to determine the meaning of a new word formed when an affix is added to the root word or when two root words are combined to form a compound word.

Upper Elementary

Uses knowledge of morphology, including Greek and Latin affixes and roots, to determine the meaning of a new word.

Uses the relationship between synonyms, antonyms and homographs to better understand the meaning of each word

	Initial Series	Middle Series	Later Series
Word Study	Prefixes	Prefixes	Prefixes
	Root Words	Root Words	Root Words
	Suffixes/ Classified Suffixes	Suffixes/ Classified Suffixes	Suffixes/ Classified Suffixes
	Compound Words		
	Word Families		
	Contractions		
		Synonyms	Synonyms
		Antonyms	Antonyms
		Reading Words	Reading Words
			Homographs
Spelling			Homophones
			Homonyms
	Spelling		
	Phonograms and Puzzle Words		
	Spelling Analysis	Spelling Analysis	Spelling Analysis
	Prepared Spelling Lists	Prepared Spelling Lists	Prepared Spelling Lists
	Dictation	Dictation	Dictation
	Personal Spelling Lists	Personal Spelling Lists	Personal Spelling Lists
	Reference Materials		
	Dictionary	Dictionary	Dictionary
Vocabulary	Personal Dictionary	Personal Dictionary	Personal Dictionary
	Context Clues	Context Clues	Context Clues
	Meaning of words or phrases using: Sentence-level context	Meaning of words or phrases using: Sentence-level context	Meaning of words or phrases using: Cause/effect relationships
		Definitions	Comparisons in text
		Examples	Overall meaning of sentence
		Restatements	Overall meaning of paragraph
			Words position in a sentence
			Words function in a sentence
		Vocabulary: Word Choice in Writing	Vocabulary: Word Choice in Writing
	Teaching Morphology	Teaching Morphology	
	Figurative Language		

	Spoken Language	Spoken Language	Spoken Language
	Reading	Reading	Reading
	Writing	Writing	Writing
	Academic Vocabulary	Academic Vocabulary	Academic Vocabulary
	Nomenclature Cards	Nomenclature Cards	Nomenclature Cards
	General Academic Language	General Academic Language	General Academic Language
	Domain Specific Words	Domain Specific Words	Domain Specific Words
	Word Relationships	Word Relationships	Word Relationships
	Enrichment of Vocabulary		
			Cause/Effect
	Grammar	Grammar	Part/Whole
	Grammar Boxes	Grammar Boxes	Items/Category
	Command Cards	Command Cards	Grammar
	Grammar in Writing	Grammar in Writing	
		Advanced Grammar Symbols	Grammar in Writing
		Figurative Language	Advanced Grammar Symbols
		Similes	Figurative Language
		Metaphors	Similes
		Idioms	Metaphors
		Adages	Idioms
		Proverbs	Adages
			Proverbs
			Connotative Language
Reference Materials	Use of a Glossary	Use of a Glossary	Use of a Glossary
	Use of a Dictionary	Use of a Dictionary	Use of a Dictionary
		Use a Thesaurus	Use a Thesaurus

Reading: Genres of Reading

Skills Inventory

Lower Elementary

Reads and comprehends literature and informational texts from a variety of genres within the appropriate text complexity band.

Upper Elementary

Reads and comprehends literature and informational texts from a variety of genres within the appropriate text complexity band.

	Initial Series	Middle Series	Later Series
Stories	Children’s Adventure Stories	Children’s Adventure Stories	Adventure Stories
	Realistic Fiction	Realistic Fiction	Realistic Fiction
	Myths	Myths	Myths
	Folktales	Folktales	
	Legends	Legends	
	Fables	Fables	

	Fantasy	Fantasy	Historical Fiction Mysteries Science Fiction Allegories Parodies Satire Graphic Novels
Dramas	Dramatic Productions Readers Theater Monologues Interpretive Reading Cards Staged Dialogue Brief Familiar Scenes	Dramatic Productions Readers Theater Monologues Interpretive Reading Cards Staged Dialogue Brief Familiar Scenes	Dramatic Productions Readers Theater Monologues Interpretive Reading Cards One-act and Multi-act Plays Written Form On Film
Poetry	Narrative Poem Free Verse Poem Nursery Rhymes Limerick	Narrative Poem Free Verse Poem Nursery Rhymes Limerick	Narrative Poems Free Verse Poems Lyrical Poems Sonnets Odes Ballads Epics
Literary Nonfiction and Historical, Scientific, and Technical Texts	Books about History Science Technical Texts Directions Forms Biographies Autobiographies Social Studies Arts Information Displays Graphs Charts Maps Digital Sources on a Range of Topics	Books about History Science Technical Texts Directions Forms Biographies Autobiographies Social Studies Arts Information Displays Graphs Charts Maps Digital Sources on a Range of Topics	Historical Accounts Scientific Accounts Technical Account

- Exposition
- Argument
- Functional Text
- Personal Essays
- Speeches
- Opinion Pieces
- Essays
- Art
- Literature
- Biographies
- Memoirs
- Journalism
- Economic Accounts

Reading Comprehension: Sources of Information

Skills Inventory

Lower Elementary

Uses the information gained from visual media and text features to demonstrate understanding of the text and explain how they contribute to the story or topic.

Upper Elementary

Uses the integration of different media, formats and words to develop a coherent understanding of the story, topic or issue and analyzes the contribution of different media to the text.

Initial Series

Middle Series

Later Series

Visual/ Auditory Media and Print or Digital Text Details

Text Features and Search Tools

- Visual elements contribute to and clarify text
- characters
- setting
- events
- key ideas
- Plot

Visual elements contribute to and clarify text

Navigating and Analyzing Text Features and Search Tools

Visual elements contribute to and clarify text

what is conveyed by text

- meaning
- tone
- beauty

Visual elements compared to words in text

- Visual elements compared to words in text
- Connection between text of story/ drama and:
- visual presentation
- oral presentation

- Listen or view
- audio of text
- video of text
- live version of text
- Multiple print or digital sources
- Multimedia elements contribute to:
- meaning

Text Features			tone
			beauty
			Compare and Contrast
			experience of reading a story, drama, or poem.
			what is “seen” and “heard” when reading text to what is perceived when listening or watching
	Bold Print		
	Captions		
	Electronic Menus		
	Glossaries		
	Headings		
	Icons		
	Indexes		
	Subheadings		
	Tables of Contents		
		Navigating and Analyzing Text Features and Search Tools	Navigating and Analyzing Text Features and Search Tools
		Animations	
		Charts	
		Diagrams	
		Graphs	
		Hyperlinks	
		Interactive Elements on Web Pages	
		Key Words	
		Sidebars	
		Timelines	
Reading Comprehension: Text Elements			
Skills Inventory			
Lower Elementary			
Recounts literature and informational texts including themes and central ideas, story elements, point of view and purpose.			
Upper Elementary			
Analyzes literature and informational texts including themes and central ideas, story elements, point of view and purpose.			
	Initial Series	Middle Series	Later Series
Theme and Central Ideas	Introduction to Central Idea	Identifying the Central Idea and Theme Using Picture Books	
		Identifying Theme and Central Idea with Oral Stories	Identifying Theme and Central Idea with Oral Stories
	Fables from diverse cultures	Identifying Theme and Central Idea with Oral Stories	Identifying Theme and Central Idea with Oral Stories
	Folktales from diverse cultures	Fables from diverse cultures	
		Folktales from diverse cultures	
	Stories from diverse cultures	Myths from diverse cultures	
		Stories from diverse cultures	Stories
		Drama	Drama

Story Elements	Retell	Poem	Poem
	Recount	Recount	
		Summarize	Summarize
	Paragraph focus		Synthesize
	Key details	Key details	
	Main Topic	Main Idea	Two or more main ideas
	Central message	Central message	Central Idea
	Lesson		
	Moral	Moral	
		Theme	Theme
	Introduction to Story Elements	Identifying Story Elements Using Story Maps	
	Identifying Story Elements Using Story Maps		
	Characters	Characters	Characters
	Response to events and challenges	How actions contribute to events	Compare and contrast 2 or more
	Key Details	Describe with details	Draw on Details
	Setting	Setting	Setting
	Key Details	Describe with details	Compare and contrast 2 or more
			Draw on Details
	Events	Events	Events
	Key Details	Describe with details	Compare and contrast 2 or more
			Draw on Details
			Plot
			Character changes as plot moves to resolution
			Plot unfolds in series of episodes
Point of View and Purpose	Discovering Text Purpose	Discovering Text Purpose	Exploring Author's Purpose
	Characters		
	Who is telling the story		
	Different points of view		
	Read aoud with different voices for each character		
	Main purpose		
	What does the author want to answer/ explain/ describe		
		Distinguish own point of view from:	
		narrators	
		characters	
		author	
		Compare and Contrast	
		point of view narration in different stories	
		first- and third-person narrations	
		firsthand and secondhand account of same event/ topic	
		Firsthand and secondhand accounts	

	where when why how Key Details		Refer to details/ examples in text explicitly explain what text says draw inferences		Quote from text explaining what text says draw inferences Cite textual evidence draw inferences
	Self Monitoring Visualizing While Reading		Self Monitoring Visualizing While Reading		Self Monitoring Visualizing While Reading
Evaluate Presented Information	Text Read Aloud key details/ key ideas ask questions answer questions recount describe		Text Read Aloud main idea supporting details paraphrase reasons evidence		Summarize
	Oral Presentation key details/ key ideas ask questions answer questions recount describe Other Media key details/ key ideas ask questions answer questions recount describe		Diverse Media and Formats (visual, quantatative, oral) main idea supporting details paraphrase		Diverse Media and Formats (visual, quantatative, oral)

Literary Comparisons

reasons
evidence

Ask and Answer Questions of speaker to:
gather additional information
clarify something that is not understood
clarify comprehension
gather additional information
deepen understanding of a topic/issue

Reciprocal Teaching

Compare and Contrast
adventures of characters
expereinces of characters
2 or more versions of the same story
by different authors
from different cultures

reasons
evidence

Ask and Answer Questions of speaker to:

offer elaboration
offer appropriate detail

Reciprocal Teaching

Compare and Contrast

story written by same author about same or similar characters
themes
settings
plots
stories, myths, and traditional literature from different cultures
treatment of similar themes
treatment of similar topics
treatment od similar patterns of events

reasons
evidence
summarize
interpret
explain

Arguments and Claims
Delineate arguments and claims
claims supported by resons
claims not supported by reason
Reciprocal Teaching

Compare and Contrast

stories in the same genre
approaches to similar themes
approaches to similar topics
texts in different forms or topics
approaches to similar themes
approaches to similar topics

Rhetorical Criticism

2 texts on same topic
identify similarities
identify differences

2 texts on same topic

Several texts on same topic

Argument and Reasoning

compare and contrast
most important points

compare and contrast
most important points
key details

compare and contrast

authors' presentations of events

to write
to speak

Supporting points in text
Author's reasons

Supporting points in text
Author's reasons
Author's evidence

Supporting points in text
Author's reasons
Author's evidence
Author's reasons that support certain points
Author's evidence that support certain points
Argument and Claims
trace
evaluate
claims supported by reason and evidence
claims not supported by reason and evidence

Text Structures and Features

Text Structure: time/chronological
Text Structure: sequence
Text Structure: cause/effect
Text Structure: problem and solution
Text Structure: descriptive
Major difference between:
books that tell stories
books that give information
Stucture of a story
beginning introduces
ending concludes the action
Range of genres
explain differences

Text Structure: time/chronological
Text Structure: sequence
Text Structure: cause/effect
Text Structure: problem and solution
Text Structure: descriptive

Text Structure: time/chronological
Text Structure: sequence
Text Structure: cause/effect
Text Structure: problem and solution
Text Structure: descriptive

Range of genres

Refer to parts
stories: chapters
dramas: scenes
Poem: Stanza
explain major differences in genres
successive parts build on earlier sections
Logical Connections
sentences
paragraphs
Overall Structure
events

Overall Structure

		ideas concepts information		chapters scenes stanzas Two or More Texts Compare and contrast overall structure events ideas concepts information Development of ideas sentence paragraph chapter section
Background Knowledge	Activating Background Knowledge Concept Mapping	Activating Background Knowledge Concept Mapping		Concept Mapping
Writing: Writing Skills				
Skills Inventory				
Lower Elementary				
Demonstrate command of the conventions of standard English capitalization, punctuation, sentence building and paragraphs when writing over both shorter and extended time frames and begin to use technology to produce writing, publish writing and collaborate with others.				
Upper Elementary				
Demonstrate command of the conventions of standard English capitalization, punctuation, and paragraphs when writing over both shorter and extended time frames, use technology and demonstrate proficient keyboarding skills to produce writing, publish writing and collaborate with others.				
	Initial Series	Middle Series		Later Series
Basic Writing Skills	Organization of Print Basic Features of Print			
Capital Letters	First Word Pronoun I Dates Peoples’ Names Holidays Product Names Geographic Names			
Punctutation	End Punctuation	Titles		

Commas	Dates	Addresses	Items in a Series
	Words in a Series	Dialogue	Sentence Introduction
	Greetings and Closings of Letters	Compound Sentence	Offset Yes and No
			Offset Question
			Direct Address
			Offset Nonrestrictive/ Parenthetical Elements
Apostrophe	Contractions		
	Possessives	Possessives	
Quotation Marks		Dialogue	Dialogue
			Titles
Underline			
			Titles
Italics			
			Titles
Parentheses			
			Offset Nonrestrictive/ Parenthetical Elements
Dashes			
			Offset Nonrestrictive/ Parenthetical Elements
Semicolons			
			The Power of Punctuation
Colons			
			The Power of Punctuation
Sentences	Types of Sentences	Types of Sentences	
	Simple	Complex	
	Compound	Compound-complex	
	Sentence Building	Sentence Building	
	Parts of Speech	Parts of Speech	
	Sentence Combining	Sentence Combining	
		Phrases and Clauses	Phrases and Clauses
Paragraphs			
	Paragraph Structure		
		Three Paragraph Essay	
			Several Related Paragraphs

Technology	Linking and Transition Words	Linking and Transition Words	Linking and Transition Words
	Exploring Digital Tools for Writing and Publishing	Exploring Digital Tools for Writing and Publishing	Exploring Digital Tools for Writing and Publishing
	Produce writing	Produce writing	Produce writing
	Publish writing	Publish writing	Publish writing
Range of Writing	Collaborate with peers.	Collaborate with peers.	Collaborate with peers.
		Interact with peers	Interact with peers
		Gather information	Gather information
		Keyboarding skills	Keyboarding skills
		Minimum of one page	Minimum of two pages
		Write for a range of discipline-specific: tasks	Write for a range of discipline-specific: tasks
		purposes	purposes
		audiences	audiences
		Write over: extended time frames	Write over: extended time frames
		shorter time frames	shorter time frames
		Using Literary Devices to Enhance Writing	Using Literary Devices to Enhance Writing
	Writing: Task, Purpose, and Audience		
	Skills Inventory		
	Lower Elementary		
	Produces writing in which the development and organization are appropriate to task and purpose.		
	Upper Elementary		
	Produces clear and coherent writing in which the development, organization, and style are appropriate to task, purpose, and audience.		
	Initial Series	Middle Series	Later Series
Task		Types of Writing: letter	Types of Writing: letter
		feature article	feature article
		editorial	editorial
		speech	speech
		Clear and coherent writing	Clear and coherent writing
		development	development
		organization	organization
			style
Purpose		Types of Writing: argue	Types of Writing: argue
		narrate an event	narrate an event
		inform	inform
		Clear and coherent writing	Clear and coherent writing

Audience	development		development
	organization		organization
			style
	Clear and coherent writing		Clear and coherent writing
	development		development
	organization		organization
			style

Writing: Planning, Revising, and Editing

Skills Inventory				
Lower Elementary				
Develops and strengthens writing by planning, revising, and editing with guidance and support from peers and adults.				
Upper Elementary				
Develops and strengthens writing by planning, revising, editing, rewriting, or trying a new approach with some guidance and support from peers and adults.				
Planning	Initial Series		Middle Series	
			Later Series	
Revising	Brainstorming		Brainstorming	
	Outlining		Outlining	
Editing	Rough Drafts		Rough Drafts	
	Giving and Receiving Feedback		Giving and Receiving Feedback	
	The Mini Lesson		The Mini Lesson	
Publishing	Student Centered Writing Conferences		Student Centered Writing Conferences	
	Editing		Editing	
	Editing Marks		Editing Marks	

Writing: Style

Skills Inventory				
Lower Elementary				
Uses knowledge of language and its conventions when listening, speaking, writing, and reading and compares formal and informal English.				
Upper Elementary				
Identifies and uses strategies to improve expression when listening, speaking, writing, and reading, recognizes variations of standard English and differentiates contexts that call for formal or informal English.				
Formal and Informal English	Initial Series		Middle Series	
			Later Series	
Grammar Symbols	Speaking and Listening		Speaking and Listening	
	Writing		Writing	
	Reading		Reading	
Writing: Punctuation			Grammar Symbols for Student's Writing	
			Grammar Symbols for Other Authors	

	Punctuation for effect	
Logical Analysis		Logical Analysis of the Student's Writing Logical Analysis of Other Authors
Writing in Different Styles		Student's Writing Other Authors
Sentence Elaboration	Transformation Purposeful Sentence Writing Expanding Sentence Beginnings	Transformation Purposeful Sentence Writing Expanding Sentence Beginnings

Genres of Writing: Informative and Explanatory

Skills Inventory			
Lower Elementary			
Writes informative/explanatory texts to examine a topic and convey ideas and information clearly through the use of facts, details, definitions and/or illustrations.			
Upper Elementary			
Writes informative/explanatory texts to examine a topic and convey ideas, concepts, and information clearly through the selection, organization, and analysis of relevant content including definitions, classification, quotations, comparison/contrast, cause/effect, formatting, graphics, and/or multimedia			
	Initial Series	Middle Series	Later Series
Elements of Informative and Explanatory Writing	Introduction Developing the Topic Conclusion	Introduction Developing the Topic Conclusion	Introduction Developing the Topic Conclusion
Organizational Elements	Definition	Definition Formatiing Graphics Multimedia Quotations	Definition Formatting Graphics Multimedia Quotations Classification Comparison/ Contrast Cause/ Effect
Words and Phrases		Words Phrases Precise language Domain-specific vocabulary Link ideas within categories of information	Words Phrases Clauses Precise language Domain-specific vocabulary Link ideas within categories of information across categories of information Transitions to clarify relationships:

			ideas
			concepts
Style			
			Formal Style
Genres of Writing: Persuasive and Argumentative			
Skills Inventory			
Lower Elementary			
Writes persuasive and argumentative pieces to support a point of view with clear organizational structure including reasons that support the opinion.			
Upper Elementary			
Writes persuasive and argumentative pieces to support claims with clear reasons and relevant evidence using credible sources and demonstrating an understanding of the topic.			
	Initial Series	Middle Series	Later Series
Elements of Persuasive and Argumentative Writing			
	Introduction and Claims	Introduction and Claims	Introduction and Claims
	Evidence and Reasons	Evidence and Reasons	Evidence and Reasons
	Conclusion	Conclusion	Conclusion
Transitional Words and Phrases			
	Words	Words	Words
		Phrases	Phrases
			Clauses
	Link opinion and reasons	Link opinion and reasons	Link opinion and reasons
			Clarify relationship between claims and reasons
Style			
			Formal Style
Genres of Writing: Narrative			
Skills Inventory			
Lower Elementary			
Writes narratives to develop real or imagined experiences or events with a clear event sequence and descriptive details of characters and events.			
Upper Elementary			
Writes narratives to develop real or imagined experiences or events with well-structured event sequences and relevant descriptive details that engage and orient the reader to narrators, characters and events.			
	Initial Series	Middle Series	Later Series
Elements of Narrative Writing			
	Plot	Plot	
	Context and Setting	Context and Setting	
	Narration	Narration	
	Characters and Actors	Characters and Actors	
	Conclusion	Conclusion	
Words and Phrases			
	Temporal Words	Temporal Words	
	signal event order	Signal event order	
	sense of closure		
		Transitional Words	Transitional Words
		Transitional Phrases	Transitional Phrases
			Transitional Clauses

Foundations: Great Story: The Story of Numbers			
Skills Inventory			
Lower Elementary			
Listens to stories about significant historical changes and is inspired to gather additional information to clarify or deepen understanding.			
	Initial Series	Middle Series	Later Series
Great Story	The Story of Numbers		

The Decimal System: Number and Quantity			
Skills Inventory			
Lower Elementary			
Understands one-to-one correspondence and number symbol, reads and writes whole numbers using numerals, words and expanded form and can identify odd and even numbers.			
Upper Elementary			
	Initial Series	Middle Series	Later Series
Numbers 1 to 10	Cards and Counters Memory Games of Numbers Colored Bead Bars	Bead Stair Snake Game—In Search of 10	
Counting and Numbers Greater than 10	Golden Beads	Introduction to Quantity Games with Quantities Change Game Knowledge of the Quantities Knowledge of the Symbols Quantity and Symbol Exchange Game Reverse Exchange Game	
	Number Cards	Introduction to Symbol Games with Symbols	
	Seguin Boards: Teens	Introduction to Quantity Games with Quantities Introduction to Symbols Games with Symbols Association of Quantity and Symbol	
	Seguin Boards: Tens	Naming the Tens Counting from 10-99	

	Bead Cabinet	100 Chain and Short Chains 1000 Chain and Long Chains Recording the Chains Number Pyramid		
	Odd and Even	Cards and Counters Hundred Board		
	Expanded Form			
	10 More or 10 Less	Bead Frame		
		Bead Frame		
The Decimal System: Place Value				
Skills Inventory				
Lower Elementary				
Uses knowledge of place value to explain the values of digits in a number, to read and write numbers using base-ten numerals, number names, and expanded form, to round a number and to compare two numbers using greater than, less than and equal to.				
Upper Elementary				
Uses knowledge of place value to explain the values of digits in a larger number, to read and write multi- digit numbers using base-ten numerals, number names, and expanded form, to round a number, to compare two numbers using greater than, less than and equal to and recognizes that a digit in one place is 10 times more (right) or 1/10 less (left) than its neighboring digit.				
		Initial Series	Middle Series	Later Series
The Decimal System, Categories, and Numeration				
	Golden Beads and Cards	Association of Quantity and Symbol Bead to Card Card to Bead Formation of Numbers Formation of Numbers with Zero Tray of Nine		
	Wooden Hierarchical Material	Quantity and Language Geometric Layout Introduction to Symbol Symbol and Quantity		
	Hierarchical Frames	Introduction to the Bead Frame Reading Numbers Introduction to 0 Composing and Writing Large Numbers		
	Greater Than, Less Than, Equal To			
	Reading and Writing Numbers	Greater Than, Less Than, Equal To Bead Frame	Greater Than, Less Than, Equal To Building the Checkerboard	

	Expanded Form			
		Infinity Street	Bank Game	
	Rounding		Stamp Game	
			Numer Line	
	Ten times More			
			Golden Mat	
	Ten Times More and 1/10 Less			Golden Mat / Decimal Board

Whole Numbers: Operations

Skills Inventory				
Uses vocabulary for talking about addition (first addend, second addend, sum), subtraction (minuend, subtrahend, difference), multiplication (multiplicand, multiplier, product) and division (dividend, divisor, quotient).				
Lower Elementary				
Solves whole number mathematical equations and word-problems using all four operations with Montessori materials (to the materials full place value capacity) moving towards abstraction.				
Upper Elementary				
Solves whole number mathematical equations and word-problems using all four operations abstractly.				
	Initial Series	Middle Series	Later Series	
Addition	Golden beads			
		Static		
		Dynamic		
	Bead Bars			
		Addition		
		Addition with Multiple Addends		
	Stamp Game			
		Introduction to the Material		
		Addition		
	Dot Game			
		One Number at a Time		
		Column Addition		
	Hierarchical Frames			
		Static		
		Dynamic		
	Unknown Numbers			
	Problem Solving			
		Bead Bars and Operations Tickets		
		Teacher-Created or Purchased Cards	Teacher-Created or Purchased Cards	
		Experiences in the Classroom	Experiences in the Classroom	
	Array			
		Peg Board / Bead Bars		
	Patterns			
			Peg Board and Graph Paper	

Subtraction

Golden beads

Static
Dynamic

Stamp Game

Static
Dynamic

Hierarchical Frames

Static
Dynamic

Unknown Numbers

Bead Bars and Operations Tickets

Problem Solving

Teacher-Created or Purchased Cards
Experiences in the Classroom

Teacher-Created or Purchased Cards
Experiences in the Classroom

Patterns

Inverse Operations

Multiplication

Golden Beads
Stamp Game
Hierarchical Frames

Stamp Game

Checkerboard

No Facts
With Fact

Reading Numbers
One-digit Multiplier
Multi-digit Multiplier
No Number Facts, No Writing
Some Facts, No Writing
Facts, Recording Problem and Final Product
Facts, Recording Partial Products
Writing Products Directly

Flat Bead Frame

Multiplication by a two to four- digit Multiplier: Writing
Final Product Only
Multiplication by a two to four- digit Multiplier: Writing
Partial Products

Bank Game

Multiplication by one-digit Multiplier
Multiplication by two-digit Multiplier
Multiplication by three-digit Number

Unknown Numbers

Bead Bars and Operations Tickets

Problem Solving

Division	Teacher-Created or Purchased Cards		
	Experiences in the Classroom		
	Geometric Form of Multiplication		
	Cross Multiplication		
	Multiplication Algorithm		
	Golden Beads	Short Division	
		Long Division	
	Stamp Game	Short Division	
		2 Digit Divisor	
		3-4 Digit Divisor	
		0 in the Middle of the Divisor	
		0 in the Units of the Divisor	
	Racks and Tubes		One-digit Divisor
			Multi-digit Divisor
			Special Cases in Division
Unknown Numbers			Recording
			Simple Recording
			Record Problem, Quotient, Remainder
			Record Intermediate Remainders, Quotient, Final Remainder
			Record What has been used, Intermediate Remainders, Quotient, Final Remainder
Problem Solving		Bead Bars and Operations Tickets	
		Teacher-Created or Purchased Cards	
		Experiences in the Classroom	

Whole Numbers: Properties of Numbers

Skills Inventory			
Lower Elementary			
Applies properties of operations for addition (Associative & Commutative) and multiplication (Associative, Commutative & Distributive) to identify arithmetic patterns and as strategies to add, subtract, multiply and divide.			
Upper Elementary			
Applies the properties of addition (Associative & Commutative) and multiplication (Associative, Commutative & Distributive) to generate equivalent expressions.			
	Initial Series	Middle Series	Later Series
Additon: Associative Law			
	Bead Bars		
	Single Parenthesis		
	Multiple Parentheses		
Addition: Commutative Law			
	Bead Bars		
	Addition Strip Board		

Multiplication: Associative Law

Fluency

Fluency

Multiplication: Communtative Law

Bead Bars

Multiplication Strip Board and Charts

Fluency

Multiplication: Distributive Law

Bead Bars

Concept and Language

Sensorial Exploration with Signs

Introduction to Symbols

Symbolic Representation

Multiplication of Composite Numbers with Number Cards

Multiplication of Composite Numbers with Number Cards

Fluency

Whole Numbers: Memorizaiton

Skills Inventory

Lower Elementary

Memorizes addition (0-10), subtraction (0-10), multiplication (0-12) and division (0-12) facts.

Upper Elementary

Demonstrates automaticity, speed and accuracy of number fact recall and application to mastery level.

Initial Series

Middle Series

Later Series

Addition

Addition Snake Game

Counting the Snake

Control of Error: Matching the 10s

Two by Two

Addition Strip Board

Using the Tables

Exploration

How Many Ways?

Cut Combinations

Addiiton Chart

Whole Board

Half Board

Simplified Board

Blank Board

Chart of Sums

Fluency

Fluency

Subtraction

Subtraction Snake Game

Counting the Snake

Multiplication	Control of Error		
	Two by Two		
	Subtraction Strip Board		
	Using the Tables		
	Exploration		
	How Many Ways?		
	Cut Combinations		
	Subtraction Chart		
	Whole Board		
	Blank Board		
Division	Chart of Differences		
	Fluency	Fluency	
		Multiplication Bead Bars	
		Exploring the Tables	
		How Many Ways?	
		Multiplying by 10	
		Multiplication Bead Board	
		Multiplication Chart	
		Whole Board	
		Half Board	
		Simplified Board	
		Blank Board	
		Fluency	
		Unit Division Board	
		Using the Board	
		Division from 81	
		Division Chart	
		Whole Board	
		Blank Board	
		Chart of Quotients	
		Fluency	Fluency

Whole Numbers: Multiples, Factors, and Divisibility

Skills Inventory			
Upper Elementary			
Demonstrates understanding of multiples, factors and divisibility, including common multiple, least common multiple, common factor, greatest common factor, composite and prime numbers.			
	Initial Series	Middle Series	Later Series
Multiples	Bead Chains and Bead Bars		
	Concept and Language with Short Bead Chains		
	Concept and Language with the Bead Bars		
	Multiples of Single-digit Numbers		

	Multiples of Multi-digit Numbers		
	Concept and Language of the Common Multiple	Peg Board Least Common Multiples (LCM) Least Common Multiples with Hierarchical Colors Paper Charts Multiples of Numbers Paper Tables A & B Table C: Concept and Language for Prime Numbers Sieve of Eratosthenes	Paper
Factors		Pegboard Concept of Factors Common Factors Greatest Common Factors Paper Finding Prime Factors on Paper Finding Least Common Multiples using Prime Factorization Finding Greatest Common Factors using Prime Factorization	Paper
Divisibility		Golden Bead Material Divisibility by 2, 5, 25 Divisibility by 4, 8 Chart for Divisibility Divisibility by 3, 6, and 9 Divisibility by 11 Divisibility by 7	
Fractions: Foundations			
Skills Inventory			
Lower Elementary			
Partition shapes (circle, rectangle) into equal shares and express these areas as fractions (written and spoken). Order fractions on a number line and compare fractions.			
Upper Elementary			
Compare two fractions by demonstrating understanding that fractions can only be compared when they refer to the same whole (have the same denominator)			
	Initial Series	Middle Series	Later Series
introduction to Fractions	Impressionistic Introduction Concept of Notation		
Common Fractions	Quantities and Names Symbols		

Fractions as Part of a Set

Quantities, Names & Symbols
Mixed Numbers & Fractions Greater than one

Equivalent Figure Material

Fractions as Part of a Set

Other Representations for Fractions
Metal Square: nine plates
Metal Triangles: four plates

Number Lines

Number Lines

Comparing Fractions

Greater Than, Less Than, Equivalence

Fractions: Equivalence

Skills Inventory
Lower Elementary
Understand and show that fractions of different sizes and shapes can be equivalent if they have the same value or the same point on a number line.
Upper Elementary
Recognize and generate equivalent fractions by demonstrating how the number and size of parts can differ in fractions with the same value.

	Initial Series	Middle Series	Later Series
Fraction Circles			
Equivalent Figure Material	Equivalency of Fractions	Equivalency of Fractions	
	Metal Square: nine plates Metal Triangles: four plates	Metal Square: nine plates Metal Triangles: four plates	
Paper		Paper	
Number Lines		Number Lines	

Fractions: Addition and Subtraction

Skills Inventory
Lower Elementary
Add and subtract fractions sensorially using Montessori materials.
Upper Elementary
Add and subtract fractions with unlike denominators (including mixed numbers) and solve addition and subtraction of fraction word problems using knowledge of fractions and number sense to estimate and assess the reasonableness of sums and differences.

	Initial Series	Middle Series	Later Series
Fraction Circles			
	Operations, Simple Cases Addition: Same Denominators Subtraction: Same Denominators		
		Operations beyond Simple Cases Addition and Subtraction: Different Denominators, Sensorial	
Mixed Numbers			

Transparencies	Addition	
	Subtraction	
Problem Solving	Operations beyond Simple Cases	
	Addition and Subtraction: Alternate Methods for Finding Common Denominators	
Paper	Teacher-Created or Purchased Cards	Teacher-Created or Purchased Cards
	Experiences in the Classroom	Experiences in the Classroom
	Operations beyond Simple Cases	
	Addition and Subtraction: Alternate Methods for Finding Common Denominators using Graph Paper	
	Addition and Subtraction: Finding and Using the LCD	
	Addition and Subtraction: Passage to Abstraction	

Fractions: Multiplication

Skills Inventory			
Lower Elementary			
Multiply fractions sensorially using Montessori materials.			
Upper Elementary			
Multiply fractions (fraction by whole number, fraction by fraction, mixed numbers) and solve multiplication fraction word problems using knowledge of fractions and number sense to estimate and assess the reasonableness of the product.			
Fraction Circles	Initial Series	Middle Series	Later Series
	Operations, Simple Cases		
Paper	Multiplication by a Whole Number	Operations beyond Simple Cases	Operations beyond Simple Cases
		Multiplication by Whole Number: Sensorial	Multiplication by Fraction: Sensorial
Problem Solving			Operations beyond Simple Cases
			Multiplication by Fractions using Graph Paper
		Teacher-Created or Purchased Cards	Teacher-Created or Purchased Cards
		Experiences in the Classroom	Experiences in the Classroom

Fractions: Division

Skills Inventory			
Lower Elementary			
Divide fractions sensorially using Montessori materials.			
Upper Elementary			
Divide fractions (fraction by whole number, fraction by fraction, mixed numbers) and solve division fraction word problems using knowledge of fractions and number sense to estimate and assess the reasonableness of the quotient.			
	Initial Series	Middle Series	Later Series

Fraction Circles

Operations, Simple Cases

Division by a Whole Number

Operations beyond Simple Cases
Division by a Whole Number: Partitive/sharing, Sensorial

Division by a Fraction: Partitive/sharing, Sensorial

Operations beyond Simple Cases

Division by a Whole Number

Division by a Fraction

Paper

Operations beyond Simple Cases

Division by Fractions: Passage to Abstraction

Problem Solving

Teacher-Created or Purchased Cards

Experiences in the Classroom

Decimals: Foundations

Skills Inventory

Upper Elementary

Read, write, and compare decimals recognizing that a digit in one place represents 10 times as much as it represents in the place to its right and 1/10 of what it represents in the place to its left.

Initial Series

Middle Series

Later Series

Decimal Board

Introduction to Decimal Fractions
Introduction to Quantity and Language
Introduction to Symbolic Notation for Decimals

Formation in Cards and Reading of Multi-digit Decimals

Conversions

Conversion of Common Fractions to and from
Decimal Fractions

Number Lines

Number Lines

Comparing Fractions

Greater Than, Less Than, Equal

Greater Than, Less Than, Equal

Rounding

Decimal Board

Decimals: Operations

Skills Inventory

Upper Elementary

Fluently add, subtract, multiply, and divide multi-digit decimals using the standard algorithm for each operation.

Initial Series

Middle Series

Later Series

Decimal Board: Operations

Addition Using Decimal Board
Subtraction Using Decimal Board
Multiplication by Unit Multiplier using Decimal Board

Addition Using Decimal Board
Subtraction Using Decimal Board
Multiplication by Unit Multiplier using Decimal Board

		Multiplication using Multi-digit Quantities on the Decimal Board	Multiplication using Multi-digit Quantities on the Decimal Board
		Division by Unit Divisor	Division by Unit Divisor
Decimal Checkerboard		Introduction to Decimal Checkerboard	
		Multiplying a Decimal by a Whole Number	
		Multiplication By a Decimal Fraction	
			Decimal Felt Squares
Skittles			
		Division with Decimals, beyond Simple Cases	Division with Decimals, beyond Simple Cases
			Dividing a Decimal Fraction by a Unit Divisor
Paper			
			Addition of Decimal Fractions: Passage to Abstraction
			Subtraction of Decimal Fractions: Passage to Abstraction
			Multiplication with Paper Only
			Division of Decimals on Paper Only

Algebra: Powers of Numbers

Skills Inventory

Lower Elementary

Demonstrates understanding of the concept and notation for squares and cubes of numbers using Montessori materials.

Upper Elementary

Demonstrates understanding of the concept and notation for squaring, cubing, square root, cube root and understands the order of operations when using exponents.

	Initial Series	Middle Series	Later Series
Squares and Cubes of Numbers			
	Bead Cabinet (Short Chains, Long Chains, Bead Squares and Cubes)		
	Exploration of Square Chains to Make Polygons		
	Exploration of Cube Chains to Make Polygons		
	Concept and Notation of a Square		
	Concept and Notation of Cube		
	Exploration of Cubes of Numbers 1-10		
	Tower of Jewels		
Squaring			
	Paper Decanomial	Paper Decanomial	
	Bead Material		
		Building a Larger Square from a Smaller Square	
		Squaring a Sum (One-digit Terms) Application to Decimal Numbers (two Digits, Products to 999)	
	Golden Beads		
		Transformation of Squares	
		Squaring a Binomial using Golden Beads	
		Application to Decimal Numbers using Golden Beads	
	Exponential Notation		

	Pegboard	
	Paper	
Cubing		
	Cubing Material	
	Binomial Cube	From a Given Cube to a Non- successive Cube
	Trinomial Cube	
	Hierarchical Trinomial Cube	
Square Root		
	Bead Material	
	Square Root Board	
	Pegboard	
	Paper	Calculating the Square Root on Paper
Cube Root		
	Cubing Material and White 2 cm cubes	
		Finding Cube Root Abstractly

Algebra: Signed Numbers

Skills Inventory
Upper Elementary
Understand that positive and negative numbers are used together to describe quantities having opposite directions or values, explain the meaning of 0, position positive and negative numbers on a number line and complete operations with positive and negative numbers.

Initial Series	Middle Series	Later Series
Negative Snake Game		Addition of Signed Numbers Subtraction of Signed Numbers Multiplication of Signed Numbers Division of Signed Numbers Division with Grouping
Number Line and Coordinate Plane		Introduction to Coordinate Planes
Absolute Value		Absolute Value Number Line Ordering
Paper		Addition Subtraction Multiplication Division
Problem Solving		Teacher-Created or Purchased Cards Experiences in the Classroom

Algebra: Algebra

Skills Inventory
Upper Elementary

Write, read, and evaluate numerical expressions in which letters stand for numbers, perform arithmetic operations, applying the properties of operations to generate equivalent expressions.

Initial Series	Middle Series	Later Series
Bead Bars		Parentheses/ Brackets/ Braces Concept of Balancing an Equation Solving for One Unknown Translating Verbal Problems into Equations Solving for Two Unknowns Graphs of Algebraic Expressions Order of Operations Inequalities Dependent and Independent Variables
Problem Solving		Teacher-Created or Purchased Cards

Ratio, Proportion, and Percent

Skills Inventory
Upper Elementary

Understands the concept of ratio, including proportion and percentage, and uses language to describe a ratio relationship between quantities.

Initial Series	Middle Series	Later Series
Ratio		Concept, Language, Notation of Ratio Ratio can be Expressed as a Fraction Ratio Expresses a Division Equal Ratios
Proportion		Concept, Language, Notation of Proportion Cross Multiplication
Percent		Centesimal Frame Concept (hundredths), language, notation Conversion of fraction insets to percentage
Problem Solving		Teacher-Created or Purchased Cards Experiences in the Classroom

Geometry: Foundations			
Skills Inventory			
Lower Elementary			
Listens to stories about significant historical changes and is inspired to gather additional information to clarify or deepen understanding.			
	Initial Series	Middle Series	Later Series
Impressionistic Stories of Geometry			
	How Geometry Got Its Name		
	The Story of the Babylonian Circle and 360 degrees		
	The Story of Area		

Geometric Figures: Investigation of Geometric Elements and Figures			
Skills Inventory			
Lower Elementary			
Recognizes and composes two-dimensional shapes (rectangles, squares, trapezoids, triangles, circle, half- circles, quarter-circles, quadrilaterals, rhombus, pentagons, hexagons) and three-dimensional shapes (cubes, right rectangular prisms, right circular cones, and right circular cylinders) based on their defining attributes.			
Upper Elementary			
Draws and identifies parts of lines (points, line segments, rays), lines and angles (right, acute obtuse), and classifies shapes by properties of their lines and angles.			
	Initial Series	Middle Series	Later Series
Sensorial Exploration and Nomenclature of Geometric Figures			
	Geometric Cabinet: Plane Figures		
	Sensorial Exploration of Shapes		
	Plane Figures		
	Constructive Triangles		
	Rectangle Box		
	Blue Triangle Box		
	Exploration with Right-Angled Scalene Triangles		
	Triangular Box		
	Small Hexagonal Box		
	Large Hexagonal Box		
Solids			
	Geometric Solids		
	Stereognostic Game		
	Bases		
	Nomenclature for Parts		
	Constructing Geometric Solids		
	Dimensions of Geometric Solids		
	Regular Prisms Transformation into Rectangular Prisms		
	Polyhedra		
Point, Line, Surface, Solid			
	Golden Beads		
	From a Solid to a Point		
	From a Point to Solid		
Lines			

Angles

Box of Sticks
Concept of a Line
Parts of a Straight Line
Position of a Straight Line
Positions of Two Lines
Intersection of Two Straight Lines

Box of Sticks

Line of Symmetry

Box of Sticks
Introduction to Angles
Parts of Angles
Relationship of Two Angles in the Same Plane
Adjacent Angles
Complementary Angles
Supplementary Angles
Vertical Angles
Adjacent Complementary Angles
Adjacent Supplementary Angles

Box of Sticks

Angles Made by a Transversal
Parallel Angles
Opposite Vertical Angles are Equal
Angle Bisector

Polygons

Geometric Cabinet
Types of Plane Geometric Figures
Types of Regular Polygons According to the Number of Sides
Types of Quadrilaterals
Types of Planar Simple Closed Curves

Box of Sticks: Triangles
Parts of a Triangle
Triangles According to Sides
Triangles According to Angles
Triangles According to Sides and Angles
Relationships between Length of Sides in Triangles
Box of Sticks: Quadrilaterals
Types of Quadrilaterals
Relationships Between Quadrilaterals
Altitude
The Family Tree of Quadrilaterals

Box of Sticks: Polygons
Parts of a Polygon
Parts of a Rhombus & Parallelogram
Parts of a Trapezoid

Circles

Parts of a Regular Polygon

Diagonals of Polygons

Number of Diagonals for Stability

Number of Diagonals in a Polygon

Sum of Angles in a Polygon

Geometric Cabinet

Concept of a Circle

Parts of a Circle: Linear

Parts of a Circle: Surface

Relative Positions between a Straight Line and a Circumference

Relative Positions between Two Circumferences

Sensorial Calculation of Circumference

Geometric Figures: Relationships of Geometric Figures

Skills Inventory

Lower Elementary

Identifies congruent, similar and equivalent figures.

Initial Series

Equivalent Figure Material

Congruent Figures

Similar Figures

Equivalent Figures

Construction Triangles

Congruency

Similarity

Equivalence

Single Figure

Two Figures

Combining Boxes

Equivalent Pictures

Equivalence Utilizing Addition

Equivalence of Two Key Triangles

Box of Blue Triangles

Constructive Triangles and Metal Insets

Middle Series

Construction Triangles

Reasoning

A Longer Chain of Reasoning

Metal Fraction Materials Cabinet

Equivalence at the Sensorial Level

Equivalence at the Reasoning Level

Geometric Figures: Measurement of Geometric Figures

Skills Inventory

Volume

Experiences in the Classroom

- Box of Cubes and Volume Material
- Concept of Volume
- Volume of a Right Rectangular Prism
- Volume of a Non-rectangular Right Prism
- Volume of a Pyramid
- Volume of a Cylinder
- Volume of a Cone
- Volume of a Sphere
- Formula for Volume
- Problem Solving
- Teacher-Created or Purchased Cards
- Experiences in the Classroom

Geometry: Coordinate System

Skills Inventory
Upper Elementary
Accurately places paired coordinates (positive and negative) in all four quadrants of a coordinate plane.

Initial Series

Middle Series

Later Series

Coordinate Planes and Ordered Pairs

- Axis/Axes
- Coordinates
- Signed Numbers
- Rational/Absolute Numbers

Graphing

- Polygons
- Four Quadrants
- Linear Equations

Problem Solving

- Teacher-Created or Purchased Cards
- Experiences in the Classroom

Theorems and Constructions: Theorems

Skills Inventory
Upper Elementary
Understands how theorems are used in geometry.

Initial Series

Middle Series

Later Series

Theorem of Pythagoras

- Triangles with the Same Base and Height are Equivalent
- The Story of Pythagoras
- Pythagorean Theorem: Plate I
- Pythagorean Theorem: Plate II

Theorems and Constructions: Geometric Constructions

Skills Inventory

Lower Elementary

Uses a variety of tools (ruler, compass, protractor, set-square) to create composite geometric shapes.

Upper Elementary

Follows given instructions for geometric constructions using knowledge of geometric tools and concepts.

Initial Series

Middle Series

Later Series

Basic Skills

- How to Zero a Ruler
- How to Use Compass
- How to Use a Protractor
- How to Use a Set-square

Design

Design with Metal Fraction Materials

Design with Compass and Straight Edge

Design with Compass and Straight Edge

CHAPTER 1

FOUNDATIONS

HOW GEOMETRY GOT ITS NAME

SKILLS INVENTORY

Lower Elementary

Listens to stories about significant historical changes and is inspired to gather additional information to clarify or deepen understanding.

MONTESSORI LESSONS

PURPOSES

INITIAL SERIES

How Geometry Got Its Name

- The Story of the Babylonian Circle and 360 degrees

The Story of Area

- To generate questions about individuals and groups who have shaped a significant historical change.
- To inspire children to ask and answer questions about information that has been presented orally.
- To inspire children to gather additional information to clarify comprehension or deepen understanding.
- An introduction to Geometry in the form of a story.

ASSESSMENT VOCABULARY

INITIAL SERIES

answer

ask

detail

information

issue

media/medium

question

speaker

text

topic

Cognitive Verbs

answer

ask

clarify

describe

present

recount

ASSESSMENT CONSIDERATIONS

Students will not be assessed on the contents of the story of *How Geometry Got Its Name*.

COLLEGE, CAREER AND CIVIC LIFE (C3) FRAMEWORK FOR STATE SOCIAL STUDIES STANDARDS**HISTORY (D2.HIS)****CHANGE, CONTINUITY AND CONTEXT**

His.3.K-2	Generate questions about individuals and groups who have shaped a significant historical change.
His.3.3-5	Generate questions about individuals and groups who have shaped significant historical changes and continuities.

COMMON CORE STATE STANDARDS (CCSS.ELA-LITERACY)**LANGUAGE: SPEAKING AND LISTENING (SL)****COMPREHENSION AND COLLABORATION**

SL.1.2	Ask and answer questions about key details in a text read aloud or information presented orally or through other media.
SL.1.3	Ask and answer questions about what a speaker says in order to gather additional information or clarify something that is not understood.
SL.2.2	Recount or describe key ideas or details from a text read aloud or information presented orally or through other media.
SL.2.3	Ask and answer questions about what a speaker says in order to clarify comprehension, gather additional information, or deepen understanding of a topic or issue.

NOTES

CHAPTER 2

GEOMETRIC FIGURES

INVESTIGATION OF GEOMETRIC ELEMENTS AND FIGURES

SKILLS INVENTORY

Lower Elementary

Recognizes and composes two-dimensional shapes (rectangles, squares, trapezoids, triangles, circle, half-circles, quarter-circles, quadrilaterals, rhombus, pentagons, hexagons) and three-dimensional shapes (cubes, right rectangular prisms, right circular cones, and right circular cylinders) based on their defining attributes.

Upper Elementary

Draws and identifies parts of lines (points, line segments, rays), lines and angles (right, acute obtuse), and classifies shapes by properties of their lines and angles.

MONTESSORI LESSONS		PURPOSES
INITIAL SERIES		
SENSORIAL EXPLORATION AND NOMENCLATURE OF GEOMETRIC FIGURES		
Geometric Cabinet: Plane Figures • Sensorial Exploration of Shapes • Plane Figures		• To review the names of the three shapes: triangle, square and circle in the demo tray. • To identify names of shapes (types of each plane figure) and types of angles through the etymology of the word.
Constructive Triangles • Rectangle Box • Blue Triangle Box • Exploration with Right-Angled Scalene Triangles • Triangular Box • Small Hexagonal Box • Large Hexagonal Box		• To understand that new shapes can be formed by joining together triangles. • To compose two-dimensional shapes (rectangles, squares, trapezoids, triangles, half-circles, and quarter-circles) to create a composite shape, and compose new shapes from the composite shape.

continues

MONTESSORI LESSONS		PURPOSES
SOLIDS		
Geometric Solids • Stereognostic Game • Bases • Nomenclature for Parts • Constructing Geometric Solids • Dimensions of Geometric Solids • Regular Prisms Transformation into Rectangular Prisms • Polyhedra		• To name and identify the geometric solids. • To compose three-dimensional shapes to create a composite shape, and compose new shapes from the composite shape.
POINT, LINE, SURFACE, SOLID		
Golden Beads • From a Solid to a Point • From a Point to Solid		• To introduce the terms solid, surface, line, and point and explore their qualities. • The idea that solids are limited by plane and curved surfaces. • The idea that surfaces are limited by straight and curved lines. • To understand that solids occupy space via three dimensions. • To experience the point as the constructor of the line, the line as the constructor of the surface, and the surface as the constructor of the solid. • Explore the relationships of squares and cubes.
LINES		
Box of Sticks • Concept of a Line • Parts of a Straight Line • Position of a Straight Line • Positions of Two Lines • Intersection of Two Straight Lines		• To provide the child with a sensorial impression of the concept of a line in geometric terms. • To provide the opportunities for the child to manipulate objects with the concept of line in mind. • To provide a sensorial impression of the parts of a straight line. • To learn nomenclature for a line, ray, and line segment, and their parts (i.e., origin and endpoint). • To reinforce that a true line has no ends. • To provide the child with sensorial impressions of the positions of a straight line. • To provide a sensorial impression of the positions of the two straight lines. • To introduce the nomenclature parallel, convergent and divergent. • To notice that lines can cross at different angles. • To emphasize the importance of perpendicular lines.

continues

MONTESSORI LESSONS		PURPOSES
ANGLES		
Box of Sticks • Introduction to Angles • Parts of Angles • Relationship of Two Angles in the Same Plane • Adjacent Angles • Complementary Angles • Supplementary Angles • Vertical Angles • Adjacent Complementary Angles • Adjacent Supplementary Angles		• To provide the child with an opportunity to manipulate objects with the concept “angle” in mind. • To learn nomenclature for an angle and its parts. • To continue the sensorial impression of types of angles. • To name angles based on their characteristics relative to right angles and straight lines. • To introduce to the child a variety of terms that are frequently encountered with reference to pairs of angles.
POLYGONS		
Geometric Cabinet • Types of Plane Geometric Figures • Types of Regular Polygons According to the Number of Sides • Types of Quadrilaterals • Types of Planar Simple Closed Curves		• To learn to classify common types of polygons. • To learn about the properties of different polygons. • To learn and consolidate nomenclature for polygons. • To distinguish between defining attributes versus non-defining attributes of shapes. • To build and draw shapes that possess defining attributes. • To recognize and draw shapes having specified attributes.
MIDDLE SERIES		
LINES		
Box of Sticks		• To draw points, lines, line segments, rays, angles (right, acute, obtuse), and perpendicular and parallel lines. • To identify parts and types of lines in two-dimensional figures.
Line of Symmetry Teacher-Created Lessons		• To recognize a line of symmetry for a two-dimensional figure as a line across the figure such that the figure can be folded along the line into matching parts. • To identify line-symmetric figures and draw lines of symmetry.

continues

MONTESSORI LESSONS		PURPOSES
ANGLES		
Box of Sticks • Angles Made by a Transversal • Parallel Angles • Opposite Vertical Angles are Equal • Angle Bisector		• To introduce terms relevant to angles. • Sensorial exploration of three key results about parallel angles. • To recognize angles as geometric shapes that are formed wherever two rays share a common endpoint.
POLYGONS		
Box of Sticks: Triangles • Parts of a Triangle • Triangles According to Sides • Triangles According to Angles • Triangles According to Sides and Angles • Relationships between Length of Sides in Triangles		• To learn to classify common types of polygons. • To learn about the properties of different polygons. • To learn and consolidate nomenclature for polygons. • To demonstrate understanding that shapes in different categories may share attributes and that the shared attributes can define a larger category. • To classify two-dimensional figures based on the presence or absence of parallel or perpendicular lines. • To classify two-dimensional figures based on the presence or absence of angles of a specified size. • To recognize right triangles as a category, and identify right triangles.
Box of Sticks: Quadrilaterals • Types of Quadrilaterals • Relationships Between Quadrilaterals • Altitude • The Family Tree of Quadrilaterals		• To learn to classify common types of polygons. • To learn about the properties of different polygons. • To learn and consolidate nomenclature for polygons. • To demonstrate understanding that shapes in different categories may share attributes and that the shared attributes can define a larger category. • To recognize rhombuses, rectangles, and squares as examples of quadrilaterals. • To draw examples of quadrilaterals that are not rhombuses, rectangles, and squares. • To understand that shapes in different categories may share attributes and that the shared attributes can define a larger category. • To recognize rhombuses, rectangles, and squares as examples of quadrilaterals. • To draw examples of quadrilaterals that are not rhombuses, rectangles, and squares. • To classify two-dimensional figures based on the presence or absence of parallel or perpendicular lines. • To classify two-dimensional figures based on the presence or absence of angles of a specified size.

continues

MONTESSORI LESSONS		PURPOSES
CIRCLES		
Geometric Cabinet • Concept of a Circle • Parts of a Circle: Linear • Parts of a Circle: Surface • Relative Positions between a Straight Line and a Circumference • Relative Positions between Two Circumferences • Sensorial Calculation of Circumference		• To connect work done with polygons to the work which will be done with circles. • To provide definitions of a circle. • For children to become familiar with the linear parts of a circle. • For children to become familiar with the surface parts of a circle. • For children to become familiar with the terms external, externally tangent, secant, internally tangent, internal and concentric as they relate to circles. • For children to understand that pi relates to every circle. • For the children to derive the formula for a calculation of circumferences. • For the children to use the formula to calculate the circumferences of circles.
LATER SERIES		
POLYGONS		
Stick Material • Parts of a Polygon • Parts of a Rhombus & Parallelogram • Parts of a Trapezoid • Parts of a Regular Polygon • Diagonals of Polygons • Number of Diagonals for Stability • Number of Diagonals in a Polygon • Sum of Angles in a Polygon		• To reinforce the idea of diagonals. • For the children to become familiar with interior angles of polygons. • For children to practice measuring angles. • For children to see the pattern in determining the sum of the degrees of the interior angles of polygons. • To demonstrate understanding that attributes belonging to a category of two-dimensional figures also belong to all subcategories of that category. • To classify two-dimensional figures in a hierarchy based on properties.

ASSESSMENT VOCABULARY	
INITIAL SERIES	MIDDLE SERIES
angle attribute compose composite shape cone cube cylinder equal face half-circle hexagon number open shape orientation pentagon pyramid quadrilateral quarter-circle rectangle rectangular prism shape size square three dimensional trapezoid triangle two-dimensional Cognitive Verbs build compose create distinguish identify recognize	<i>In addition to previous vocabulary:</i> acute angle angle measure category four geometric large/larger line line of symmetry line segment match obtuse angle parallel lines part point ray rhombus right angle right triangle side shape two Cognitive Verbs classify define form match share understand

ASSESSMENT CONSIDERATIONS**INITIAL SERIES****Students will be asked to:****Polygons**

- Distinguish between defining attributes (e.g., triangles are closed and three-sided) versus non-defining attributes (e.g., color, orientation, overall size) of shapes. (1.G.A.1)
- Build and draw shapes that possess defining attributes. (1.G.A.1)
- Compose two-dimensional shapes (rectangles, squares, trapezoids, triangles, half-circles, and quarter-circles) to create a composite shape, and compose new shapes from the composite shape. (1.G.A.2)
- Compose three-dimensional shapes (cubes, right rectangular prisms, right circular cones, and right circular cylinders) to create a composite shape, and compose new shapes from the composite shape. (1.G.A.2)
- Recognize and draw shapes having specified attributes (a given number of angles or a given number of equal faces). (2.G.A.1)
- Identify triangles, quadrilaterals, pentagons, hexagons, and cubes. (2.G.A.1)

MIDDLE SERIES**Students will be asked to:****Lines**

- Draw points, lines, line segments, rays, angles (right, acute, obtuse), and perpendicular and parallel lines. (4.G.A.1)
- Identify parts and types of lines in two-dimensional figures. (4.G.A.1)
- Recognize a line of symmetry for a two-dimensional figure as a line across the figure such that the figure can be folded along the line into matching parts. (4.G.A.3)
- Identify line-symmetric figures and draw lines of symmetry. (4.G.A.3)

Angles

- Recognize angles as geometric shapes that are formed wherever two rays share a common endpoint. (4.MD.C.5)

Polygons

- Demonstrate understanding that shapes in different categories may share attributes and that the shared attributes can define a larger category. (3.G.A.1)
- Recognize rhombuses, rectangles, and squares as examples of quadrilaterals. (3.G.A.1)
- Draw examples of quadrilaterals that are not rhombuses, rectangles, and squares. (3.G.A.1)
- Understand that shapes in different categories may share attributes and that the shared attributes can define a larger category. (3.G.A.1)
- Recognize rhombuses, rectangles, and squares as examples of quadrilaterals. (3.G.A.1)
- Draw examples of quadrilaterals that are not rhombuses, rectangles, and squares. (3.G.A.1)
- Classify two-dimensional figures based on the presence or absence of parallel or perpendicular lines. (4.G.A.2)
- Classify two-dimensional figures based on the presence or absence of angles of a specified size. (4.G.A.2)
- Recognize right triangles as a category, and identify right triangles. (4.G.A.2)

continues

ASSESSMENT CONSIDERATIONS**LATER SERIES****Students will be asked to:****Polygons**

- Demonstrate understanding that attributes belonging to a category of two-dimensional figures also belong to all subcategories of that category. (5.G.B.3)
- Classify two-dimensional figures in a hierarchy based on properties. (5.G.B.4)

COMMON CORE STATE STANDARDS (CCSS.MATH.CONTENT)**GEOMETRY (G)****REASON WITH SHAPES AND THEIR ATTRIBUTES**

1.G.A.1	Distinguish between defining attributes (e.g., triangles are closed and three-sided) versus non-defining attributes (e.g., color, orientation, overall size); build and draw shapes to possess defining attributes.
1.G.A.2	Compose two-dimensional shapes (rectangles, squares, trapezoids, triangles, half-circles, and quarter-circles) or three-dimensional shapes (cubes, right rectangular prisms, right circular cones, and right circular cylinders) to create a composite shape, and compose new shapes from the composite shape.
2.G.A.1	Recognize and draw shapes having specified attributes, such as a given number of angles or a given number of equal faces. Identify triangles, quadrilaterals, pentagons, hexagons, and cubes.
3.G.A.1	Understand that shapes in different categories (e.g., rhombuses, rectangles, and others) may share attributes (e.g., having four sides), and that the shared attributes can define a larger category (e.g., quadrilaterals). Recognize rhombuses, rectangles, and squares as examples of quadrilaterals, and draw examples of quadrilaterals that do not belong to any of these subcategories.

DRAW AND IDENTIFY LINES AND ANGLES, AND CLASSIFY SHAPES BY PROPERTIES OF THEIR LINES AND ANGLES

4.G.A.1	Draw points, lines, line segments, rays, angles (right, acute, obtuse), and perpendicular and parallel lines. Identify these in two-dimensional figures.
4.G.A.2	Classify two-dimensional figures based on the presence or absence of parallel or perpendicular lines, or the presence or absence of angles of a specified size. Recognize right triangles as a category, and identify right triangles.
4.G.A.3	Recognize a line of symmetry for a two-dimensional figure as a line across the figure such that the figure can be folded along the line into matching parts. Identify line-symmetric figures and draw lines of symmetry.

continues

COMMON CORE STATE STANDARDS (CCSS.MATH.CONTENT)**CLASSIFY TWO-DIMENSIONAL FIGURES INTO CATEGORIES BASED ON THEIR PROPERTIES**

5.G.B.3 Understand that attributes belonging to a category of two-dimensional figures also belong to all subcategories of that category. For example, all rectangles have four right angles and squares are rectangles, so all squares have four right angles.

5.G.B.4 Classify two-dimensional figures in a hierarchy based on properties.

MEASUREMENT AND DATA (MD)**GEOMETRIC MEASUREMENT: UNDERSTAND CONCEPTS OF ANGLE AND MEASURE ANGLES**

4.MD.C.5 Recognize angles as geometric shapes that are formed wherever two rays share a common endpoint, and understand concepts of angle measurement.

4.MD.C.5.A An angle is measured with reference to a circle with its center at the common endpoint of the rays, by considering the fraction of the circular arc between the points where the two rays intersect the circle. An angle that turns through $\frac{1}{360}$ of a circle is called a “one-degree angle,” and can be used to measure angles.

NOTES

RELATIONSHIPS OF GEOMETRIC FIGURES

SKILLS INVENTORY

Lower Elementary

Identifies congruent, similar and equivalent figures.

MONTESSORI LESSONS

PURPOSES

INITIAL SERIES

Equivalent Figure Material

- Congruent, Similar, Equivalent Figures

Congruency

- Similarity
- Equivalence

Constructive Triangles

- Congruency
- Similarity
- Equivalence
- Single Figure
- Two Figures
- Combining Boxes
- Equivalent Pictures
- Equivalence Utilizing Addition
- Equivalence of Two Key Triangles
- Box of Blue Triangles

Constructive Triangles and Metal Insets

- To differentiate between figures that are congruent, similar, and equivalent.
- To provide a sensorial experience of congruency, similarity and equivalence.
- To become familiar with the concept and nomenclature for congruency, similarity and equivalence.

continues

MONTESSORI LESSONS		PURPOSES
MIDDLE SERIES		
Constructive Triangles - Reasoning - A Longer Chain of Reasoning	- To differentiate between figures that are congruent, similar, and equivalent. - To provide a sensorial experience of congruency, similarity and equivalence. - To become familiar with the concept and nomenclature for congruency, similarity and equivalence.	
Metal Fraction Materials Cabinet - Equivalence at the Sensorial Level - Equivalence at the Reasoning Level		

ASSESSMENT VOCABULARY

Students will not be assessed on Congruence and Similarity.

ASSESSMENT CONSIDERATIONS

Students will not be assessed on Congruence and Similarity.

COMMON CORE STATE STANDARDS

Standards for Congruence and Similarity are found beginning in 8th grade.

NOTES

MEASUREMENT OF GEOMETRIC FIGURES

SKILLS INVENTORY

Lower Elementary

- Understands the concepts of area and perimeter and how they relate to addition and multiplication.
- Understands the concept of angle and how to measure angles.

Upper Elementary

- Understands the concepts of area, surface area and volume and how to apply the formulas for finding area, perimeter and volume.

MONTESORI LESSONS

PURPOSES

MIDDLE SERIES

ANGLES

Measuring Angles

- The Story of Angles
- Measurement of an Angle
 - Using the Montessori Protractor
 - Using a Protractor
- Adding and Subtracting Angles

- To experience sensorially the measurement of various angles.
- To introduce tools for measuring angles.
- To understand concepts of angle measurement.
- To measure angles in whole-number degrees using a protractor.
- To sketch angles of specified measure.
- To recognize that an angle that turns through n one-degree angles is said to have an angle measure of n degrees.
- To relate the operations of addition and subtraction to the measurement of angles.
- To recognize angle measure as additive, the angle measure of the whole is the sum of the angle measures of the parts.

Sensorial Calculation of Circumference

- To recognize that an angle is measured with reference to a circle with its center at the common endpoint of the rays.
- To demonstrate understanding that an angle that turns through $1/360$ of a circle is called a "one-degree angle," and can be used to measure angles.

Problem Solving

- Teacher-Created or Purchased Cards
- Experiences in the Classroom

- To solve addition and subtraction problems to find unknown angles on a diagram in real world and mathematical problems.

continues

MONTESSORI LESSONS	PURPOSES
AREA OF PLANE FIGURES	
Equivalent Figure Material and Yellow Area Material • Concept of Area • Area of a Rectangle • Perimeter	• To recognize area as an attribute of plane figures. • To understand concepts of area measurement. • To describe that a square with side length 1 unit, called “a unit square,” is said to have “one square unit” of area. • To demonstrate that “a unit square” can be used to measure area. • To describe that a plane figure which can be covered without gaps or overlaps by n unit squares is said to have an area of n square units. • To measure areas by counting unit squares. • To find the area of a rectangle with whole-number side lengths by tiling it. • To find rectangles with the same perimeter and different areas or with the same area and different perimeter. • To find areas of rectilinear figures by decomposing them into non-overlapping rectangles and adding the areas of the non-overlapping parts.
Formula for Area	• To relate area to the operations of multiplication and addition. • To show that the area found by tiling is the same as the area that would be found by multiplying the side lengths. • To represent whole-number products as rectangular areas in mathematical reasoning. • To use tiling to show in a concrete case that the area of a rectangle with whole-number side lengths a and $b + c$ is the sum of $a \times b$ and $a \times c$. • To use area models to represent the distributive property in mathematical reasoning. • To recognize area as additive.
Problem Solving • Teacher-Created or Purchased Cards • Experiences in the Classroom	• To multiply side lengths to find areas of rectangles in the context of solving real world and mathematical problems. • To solve real world and mathematical problems involving perimeters of polygons. • To solve real world and mathematical problems involving finding the unknown side-length of a perimeter of a polygon. • To solve real world and mathematical problems exhibiting rectangles with the same perimeter and different areas. • To solve real world and mathematical problems exhibiting rectangles with the same perimeter with the same area and different perimeters. • To apply the area and perimeter formulas for rectangles in real world and mathematical problems.

continues

MONTESSORI LESSONS		PURPOSES
LATER SERIES		
AREA OF PLANE FIGURES		
Equivalent Figure Material and Yellow Area Material • Area of a Rectangle • Area of a Parallelogram • Area of a Triangle: Double the Area • Area of a Triangle: Bisect the Base • Area of a Triangle: Bisect the Height • Area of a Trapezoid • Area of a Rhombus • Area of a Decagon • Area of a Pentagon • Area of a Circle		• To find the area of a rectangle with fractional side lengths by tiling it with unit squares of the appropriate unit fraction side lengths. • To show that the area of a rectangle found by tiling is the same as would be found by multiplying the side lengths. • To multiply fractional side lengths to find areas of rectangles. • To represent fraction products as rectangular areas. • To find the area of triangles by composing into rectangles or decomposing into triangles and other shapes. • To find the area of special quadrilaterals by composing into rectangles or decomposing into triangles and other shapes. • To find the area of polygons by composing into rectangles or decomposing into triangles and other shapes. • To provide a sensorial foundation for calculating the area of the circle. • For the children to use the formula to calculate the area of circles. • For the children to derive the formula for calculation of area of a circle.
Problem Solving • Teacher-Created or Purchased Cards • Experiences in the Classroom		• To offer an opportunity to apply the knowledge of area of plane figures to real-life situations.
AREA OF SOLIDS		
Geometric Solids • Surface Area • Polyhedra • Cylinder • Cone		• To provide a sensorial approach to discovering the formulas for surface area. • To represent three-dimensional figures using nets made up of rectangles and triangles. • To use the nets to find the surface area of these three-dimensional figures.
Problem Solving • Teacher-Created or Purchased Cards • Experiences in the Classroom		• To solve real-world and mathematical problems of right triangles, other triangles, special quadrilaterals, and polygons by applying the techniques for composing into rectangles or decomposing into triangles and other shapes. • To solve real-world and mathematical problems by representing three-dimensional figures using nets made up of rectangles and triangles, using the nets to find the surface area of these figures.

continues

MONTESSORI LESSONS	PURPOSES
VOLUME	
Box of Cubes and Volume Material • Concept of Volume • Volume of a Right Rectangular Prism • Volume of a Non-rectangular Right Prism • Volume of a Pyramid • Volume of a Cylinder • Volume of a Cone • Volume of a Sphere	• To recognize volume as an attribute of solid figures and understand concepts of volume measurement. • To explain that a cube with side length 1 unit, called a “unit cube,” is said to have “one cubic unit” of volume, and can be used to measure volume. • To describe that a solid figure which can be packed without gaps or overlaps using n unit cubes is said to have a volume of n cubic units. • To measure volumes by counting unit cubes, using cubic cm, cubic in, cubic ft, and improvised units. • To find the volume of a right rectangular prism with whole-number side lengths by packing it with unit cubes. • To find volumes of solid figures composed of two non-overlapping right rectangular prisms by adding the volumes of the non-overlapping parts.
Formula for Volume	• To relate volume to the operations of multiplication and addition. • To represent threefold whole-number products as volumes (represent the associative property of multiplication). • To explain that the volume found using unit cubes is the same as when found by multiplying the edge lengths, equivalently by multiplying the height by the area of the base. • To apply the formulas $V = l \times w \times h$ and $V = b \times h$ for rectangular prisms to find volumes of right rectangular prisms with whole-number edge lengths. • To recognize volume as additive. • To apply the formulas $V = l w h$ and $V = b h$ to find volumes of right rectangular prisms with fractional edge lengths. • To find the volume of a right rectangular prism with fractional edge lengths by packing it with unit cubes of the appropriate unit fraction edge lengths, and show that the volume is the same as would be found by multiplying the edge lengths of the prism.
Problem Solving • Teacher-Created or Purchased Cards • Experiences in the Classroom	• To solve real world and mathematical problems involving volume. • To solve real world and mathematical problems by applying the formulas $V = l \times w \times h$ and $V = b \times h$ for rectangular prisms to find volumes of right rectangular prisms with whole-number edge lengths. • To solve real world problems by finding volumes of solid figures composed of two non-overlapping right rectangular prisms by adding the volumes of the non-overlapping parts. • To solve real world and mathematical problems by applying the formulas $V = l w h$ and $V = b h$ to find volumes of right rectangular prisms with fractional edge lengths

ASSESSMENT VOCABULARY

MIDDLE SERIES

add
additive
angle
angle measure
area
area formula
area model
attribute
center
circle
circular arc
count
decompose/decomposition
degree
diagram
distributive property
equation
fraction
geometric
intersection/intersecting
mathematical problem
measurement
multiply
one-degree angle
part
perimeter
perimeter formula
plane figure
point
polygon
product
protractor
ray
real-world problem
rectangle

rectilinear figure
represent
shape
side length
sketch
square centimeter (cm²)
square foot (ft²)
square inch (in²)
square meter (m²)
subtraction
sum
symbol
two
unit
unknown
whole
whole number

Cognitive Verbs

apply
decompose
measure
recognize
represent
solve
understand
consider
decompose
diagram
form
measure
recognize
share
solve
understand

LATER SERIES

In addition to previous vocabulary:

associative property
attribute
base
compose
count
cubic centimeter (cm³)
cubic foot (ft³)
cubic inch (in³)
cubic meter (m³)
edge length
equivalent
formula
height
multiplication
net
operation
prism
rectangular prism
right triangle
solid
special quadrilateral
surface area
three dimensional
triangle
unit cube
unit fraction
volume

Cognitive Verbs

compose
relate

ASSESSMENT CONSIDERATIONS**MIDDLE SERIES****Students will be asked to:****Area of Plane Figures**

- Recognize area as an attribute of plane figures and understand concepts of area measurement. (3.MD.C.5)
- Describe that a square with side length 1 unit, called “a unit square”, is said to have “one square unit” of area. (3.MD.C.5.A)
- Demonstrate that “a unit square” can be used to measure area. (3.MD.C.5.A)
- Describe that a plane figure which can be covered without gaps or overlaps by n unit squares is said to have an area of n square units. (3.MD.C.5.B)
- Measure areas by counting unit squares (square cm, square m, square in, square ft, and improvised units). (3.MD.C.6)
- Relate area to the operations of multiplication and addition. (3.MD.C.7)
- Find the area of a rectangle with whole-number side lengths by tiling it. (3.MD.C.7.A)
- Show that the area found by tiling is the same as the area that would be found by multiplying the side lengths. (3.MD.C.7.A)
- Represent whole-number products as rectangular areas in mathematical reasoning. (3.MD.C.7.B)
- Find rectangles with the same perimeter and different areas or with the same area and different perimeters. (3.MD.D.8)
- Use tiling to show in a concrete case that the area of a rectangle with whole-number side lengths a and $b + c$ is the sum of $a \times b$ and $a \times c$. (3.MD.C.7.C)
- Use area models to represent the distributive property in mathematical reasoning. (3.MD.C.7.C)
- Recognize area as additive. (3.MD.C.7.D)
- Find areas of rectilinear figures by decomposing them into non-overlapping rectangles and adding the areas of the non-overlapping parts, applying this technique to solve real world problems. (3.MD.C.7.D)

Measurement of Angles

- Understand concepts of angle measurement. (4.MD.C.5)
- Recognize that an angle is measured with reference to a circle with its center at the common endpoint of the rays. (4.MD.C.5.A)
- Recognize that an angle that turns through n one-degree angles is said to have an angle measure of n degrees. (4.MD.C.5.B)
- Measure angles in whole-number degrees using a protractor. (4.MD.C.6)
- Sketch angles of specified measure. (4.MD.C.6)
- Recognize angle measure as additive, the angle measure of the whole is the sum of the angle measures of the parts. (4.MS.C.7)
- Solve addition and subtraction problems to find unknown angles on a diagram in real world and mathematical problems. (4.MS.C.7)

continues

ASSESSMENT CONSIDERATIONS

Word Problems

- Multiply side lengths to find areas of rectangles with whole-number side lengths in the context of solving real world and mathematical problems. (3.MD.C.7.B)
- Solve real world and mathematical problems involving perimeters of polygons, including finding the perimeter given the side lengths, finding an unknown side length, and exhibiting rectangles with the same perimeter and different areas or with the same area and different perimeters. (3.MD.D.8)
- Apply the area and perimeter formulas for rectangles in real world and mathematical problems. For example, find the width of a rectangular room given the area of the flooring and the length, by viewing the area formula as a multiplication equation with an unknown factor. (4.MD.A.3)

LATER SERIES

Area of Plane Figures

- Find the area of a rectangle with fractional side lengths by tiling it with unit squares of the appropriate unit fraction side lengths, and show that the area is the same as would be found by multiplying the side lengths. (5.NF.B.4.B)
- Multiply fractional side lengths to find areas of rectangles, and represent fraction products as rectangular areas. (5.NF.B.4.B)
- Find the area of right triangles, other triangles, special quadrilaterals, and polygons by composing into rectangles or decomposing into triangles and other shapes. (6.G.A.1)

Area of Solids

- Represent three-dimensional figures using nets made up of rectangles and triangles, and use the nets to find the surface area of these figures. (6.G.A.4)

Volume

- Recognize volume as an attribute of solid figures and understand concepts of volume measurement. (5.MD.C.3)
- Explain that a cube with side length 1 unit, called a “unit cube”, is said to have “one cubic unit” of volume, and can be used to measure volume. (5.MD.C.3.A)
- Describe that a solid figure which can be packed without gaps or overlaps using n unit cubes is said to have a volume of n cubic units. (5.MD.C.3.B)
- Measure volumes by counting unit cubes, using cubic cm, cubic in, cubic ft, and improvised units. (5.MD.C.4)
- Relate volume to the operations of multiplication and addition. (5.MD.C.5)
- Find the volume of a right rectangular prism with whole-number side lengths by packing it with unit cubes. (5.MD.C.5.A)
- Explain that the volume found using unit cubes is the same as when found by multiplying the edge lengths, equivalently by multiplying the height by the area of the base. (5.MD.C.5.A)
- Represent threefold whole-number products as volumes (represent the associative property of multiplication). (5.MD.C.5.A)
- Apply the formulas $V = l \times w \times h$ and $V = b \times h$ for rectangular prisms to find volumes of right rectangular prisms with whole-number edge lengths. (5.MD.C.5.B)
- Recognize volume as additive. (5.MD.C.5.C)
- Find volumes of solid figures composed of two non-overlapping right rectangular prisms by adding the volumes of the non-overlapping parts. (5.MD.C.5.C)

continues

ASSESSMENT CONSIDERATIONS

- Find the volume of a right rectangular prism with fractional edge lengths by packing it with unit cubes of the appropriate unit fraction edge lengths, and show that the volume is the same as would be found by multiplying the edge lengths of the prism. (6.G.A.2)
- Apply the formulas $V = l w h$ and $V = b h$ to find volumes of right rectangular prisms with fractional edge lengths. (6.G.A.2)

Word Problems

- Solve real world and mathematical problems involving volume. (5.MD.C.5)
- Solve real world and mathematical problems by applying the formulas $V = l \times w \times h$ and $V = b \times h$ for rectangular prisms to find volumes of right rectangular prisms with whole-number edge lengths. (5.MD.C.5.B)
- Solve real world problems by finding volumes of solid figures composed of two non-overlapping right rectangular prisms by adding the volumes of the non-overlapping parts. (5.MD.C.5.C)
- Solve real world and mathematical problems by applying the formulas $V = l w h$ and $V = b h$ to find volumes of right rectangular prisms with fractional edge lengths. (6.G.A.2)
- Solve real-world and mathematical problems of right triangles, other triangles, special quadrilaterals, and polygons by applying the techniques for composing into rectangles or decomposing into triangles and other shapes. (6.G.A.1)
- Solve real-world and mathematical problems by representing three-dimensional figures using nets made up of rectangles and triangles, using the nets to find the surface area of these figures. (6.G.A.4)

COMMON CORE STATE STANDARDS (CCSS.MATH.CONTENT)**MEASUREMENT AND DATA (MD)****GEOMETRIC MEASUREMENT: UNDERSTAND CONCEPTS OF AREA AND RELATE AREA TO MULTIPLICATION AND TO ADDITION**

3.MD.C.5	Recognize area as an attribute of plane figures and understand concepts of area measurement.
3.MD.C.5.A	A square with side length 1 unit, called “a unit square”, is said to have “one square unit” of area, and can be used to measure area.
3.MD.C.5.B	A plane figure which can be covered without gaps or overlaps by n unit squares is said to have an area of n square units.
3.MD.C.6	Measure areas by counting unit squares (square cm, square m, square in, square ft, and improvised units).
3.MD.C.7	Relate area to the operations of multiplication and addition.
3.MD.C.7.A	Find the area of a rectangle with whole-number side lengths by tiling it, and show that the area is the same as would be found by multiplying the side lengths.

continues

COMMON CORE STATE STANDARDS (CCSS.MATH.CONTENT)

3.MD.C.7.B	Multiply side lengths to find areas of rectangles with whole-number side lengths in the context of solving real world and mathematical problems, and represent whole-number products as rectangular areas in mathematical reasoning.
3.MD.C.7.C	Use tiling to show in a concrete case that the area of a rectangle with whole-number side lengths a and $b + c$ is the sum of $a \times b$ and $a \times c$. Use area models to represent the distributive property in mathematical reasoning.
3.MD.C.7.D	Recognize area as additive. Find areas of rectilinear figures by decomposing them into non-overlapping rectangles and adding the areas of the non-overlapping parts, applying this technique to solve real world problems.

GEOMETRIC MEASUREMENT: RECOGNIZE PERIMETER

3.MD.D.8	Solve real world and mathematical problems involving perimeters of polygons, including finding the perimeter given the side lengths, finding an unknown side length, and exhibiting rectangles with the same perimeter and different areas or with the same area and different perimeters.
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SOLVE PROBLEMS INVOLVING MEASUREMENT AND CONVERSION OF MEASUREMENTS

4.MD.A.3	Apply the area and perimeter formulas for rectangles in real world and mathematical problems. For example, find the width of a rectangular room given the area of the flooring and the length, by viewing the area formula as a multiplication equation with an unknown factor.
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GEOMETRIC MEASUREMENT: UNDERSTAND CONCEPTS OF ANGLE AND MEASURE ANGLES

4.MD.C.5	Recognize angles as geometric shapes that are formed wherever two rays share a common endpoint, and understand concepts of angle measurement.
4.MD.C.5.A	An angle is measured with reference to a circle with its center at the common endpoint of the rays, by considering the fraction of the circular arc between the points where the two rays intersect the circle. An angle that turns through $1/360$ of a circle is called a "one-degree angle," and can be used to measure angles.
4.MD.C.5.B	An angle that turns through n one-degree angles is said to have an angle measure of n degrees.
4.MD.C.6	Measure angles in whole-number degrees using a protractor. Sketch angles of specified measure.
4.MD.C.7	Recognize angle measure as additive. When an angle is decomposed into non-overlapping parts, the angle measure of the whole is the sum of the angle measures of the parts. Solve addition and subtraction problems to find unknown angles on a diagram in real world and mathematical problems, e.g., by using an equation with a symbol for the unknown angle measure.

continues

COMMON CORE STATE STANDARDS (CCSS.MATH.CONTENT)**GEOMETRIC MEASUREMENT: UNDERSTAND CONCEPTS OF VOLUME**

5.MD.C.3	Recognize volume as an attribute of solid figures and understand concepts of volume measurement.
5.MD.C.3.A	A cube with side length 1 unit, called a “unit cube,” is said to have “one cubic unit” of volume, and can be used to measure volume.
5.MD.C.3.B	A solid figure which can be packed without gaps or overlaps using n unit cubes is said to have a volume of n cubic units.
5.MD.C.4	Measure volumes by counting unit cubes, using cubic cm, cubic in, cubic ft, and improvised units.
5.MD.C.5	Relate volume to the operations of multiplication and addition and solve real world and mathematical problems involving volume.
5.MD.C.5.A	Find the volume of a right rectangular prism with whole-number side lengths by packing it with unit cubes, and show that the volume is the same as would be found by multiplying the edge lengths, equivalently by multiplying the height by the area of the base. Represent threefold whole-number products as volumes, e.g., to represent the associative property of multiplication.
5.MD.C.5.B	Apply the formulas $V = l \times w \times h$ and $V = b \times h$ for rectangular prisms to find volumes of right rectangular prisms with whole-number edge lengths in the context of solving real world and mathematical problems.
5.MD.C.5.C	Recognize volume as additive. Find volumes of solid figures composed of two non-overlapping right rectangular prisms by adding the volumes of the non-overlapping parts, applying this technique to solve real world problems.

GEOMETRY (G)**SOLVE REAL-WORLD AND MATHEMATICAL PROBLEMS INVOLVING AREA, SURFACE AREA, AND VOLUME**

6.G.A.1	Find the area of right triangles, other triangles, special quadrilaterals, and polygons by composing into rectangles or decomposing into triangles and other shapes; apply these techniques in the context of solving real-world and mathematical problems.
6.G.A.2	Find the volume of a right rectangular prism with fractional edge lengths by packing it with unit cubes of the appropriate unit fraction edge lengths, and show that the volume is the same as would be found by multiplying the edge lengths of the prism. Apply the formulas $V = l w h$ and $V = b h$ to find volumes of right rectangular prisms with fractional edge lengths in the context of solving real-world and mathematical problems.
6.G.A.4	Represent three-dimensional figures using nets made up of rectangles and triangles, and use the nets to find the surface area of these figures. Apply these techniques in the context of solving real-world and mathematical problems.

continues

COMMON CORE STATE STANDARDS (CCSS.MATH.CONTENT)**NUMBER AND OPERATIONS: FRACTIONS (NF)****APPLY AND EXTEND PREVIOUS UNDERSTANDINGS OF MULTIPLICATION AND DIVISION****5.NF.B.4.B**

Find the area of a rectangle with fractional side lengths by tiling it with unit squares of the appropriate unit fraction side lengths, and show that the area is the same as would be found by multiplying the side lengths. Multiply fractional side lengths to find areas of rectangles, and represent fraction products as rectangular areas

NOTES

CHAPTER 3

THEOREMS AND CONSTRUCTIONS

THEOREMS

SKILLS INVENTORY

Upper Elementary

Understands how theorems are used in geometry.

MONTESORI LESSONS

PURPOSES

LATER SERIES

Theorem of Pythagoras

- Triangles with the Same Base and Height are Equivalent
- The Story of Pythagoras
- Pythagorean Theorem: Plate I
- Pythagorean Theorem: Plate II
- Pythagorean Theorem: Plate III
- Pythagorean Theorem Applied to Other Figures

- To demonstrate that Pythagoras was a real person, which may inspire further research.
- To provide a sensorial impression of the Pythagorean theorem.
- To explore the numerical relationships in the Pythagorean Theorem.
- To prepare for learning the Pythagorean Theorem in its full algebraic form.
- To apply the Pythagorean Theorem to plane figures other than squares.

ASSESSMENT VOCABULARY

Students will not be assessed on Theorems.

ASSESSMENT CONSIDERATIONS

Students will not be assessed on Theorems.

COMMON CORE STATE STANDARDS

Standards for Theorems are found beginning in 8th grade.

NOTES

GEOMETRIC CONSTRUCTIONS

SKILLS INVENTORY

Lower Elementary

Uses a variety of tools (ruler, compass, protractor, set-square) to create composite geometric shapes.

Upper Elementary

Follows given instructions for geometric constructions using knowledge of geometric tools and concepts.

MONTESORI LESSONS PURPOSES

INITIAL SERIES

Basic Skills

- How to Zero a Ruler
- How to Use Compass
- How to Use a Protractor
- How to Use a Set-square

- To become familiar with geometric tools.
- To connect the areas of geometry and art.

Design with Metal Fraction Materials

- To solve the puzzle of geometric constructions.
- To compose two-dimensional shapes to create a composite shape.
- To compose new shapes from a composite shape.

MIDDLE AND LATER SERIES

Design with Compass and Straight Edge

- To encourage the child's aesthetic sensibility.
- To learn to read and follow complex instructions.
- To give the child tools for artistic expression.
- To connect the areas of Geometry and Art.

ASSESSMENT VOCABULARY

INITIAL SERIES

compose
composite shape
cone
cube
cylinder
half-circle
pyramid
quarter-circle

rectangle
rectangular prism
shape
square
three dimensional
trapezoid
triangle
two-dimensional

Cognitive Verbs

compose
create

ASSESSMENT CONSIDERATIONS**INITIAL SERIES****Students will be asked to:**

- Compose two-dimensional shapes (rectangles, squares, trapezoids, triangles, half-circles, and quarter-circles) to create a composite shape, and compose new shapes from the composite shape. (1.G.A.2)

MIDDLE AND LATER SERIES

Students will not be assessed on Geometric Constructions.

COMMON CORE STATE STANDARDS (CCSS.MATH.CONTENT)**GEOMETRY (G)****REASON WITH SHAPES AND THEIR ATTRIBUTES****1.G.A.2**

Compose two-dimensional shapes (rectangles, squares, trapezoids, triangles, half-circles, and quarter-circles) or three-dimensional shapes (cubes, right rectangular prisms, right circular cones, and right circular cylinders) to create a composite shape, and compose new shapes from the composite shape.

NOTES

CHAPTER 4

COORDINATE SYSTEMS

COORDINATE SYSTEM

SKILLS INVENTORY

Later Series

Accurately places paired coordinates (positive and negative) in all four quadrants of a coordinate plane.

MONTESSORI LESSONS	PURPOSES
LATER SERIES	
Coordinate Planes and Ordered Pairs • Teacher-Created Lessons • Axis/Axes • Coordinates • Signed Numbers • Rational/Absolute Numbers	• To use a pair of perpendicular number lines (axes) to define a coordinate system. • To understand the intersection of the lines in a coordinate system is the origin and is arranged to coincide with the 0 on each perpendicular line. • To place a given point in the plane which is located by using an ordered pair of numbers (coordinates). • To understand that the first number in a coordinate system indicates how far to travel from the origin, in the direction of one axis (x-axis) and the second number indicates how far to travel in the direction of the second axis (y-axis). • To recognize the convention that the names of the two axes and the coordinates correspond (x-axis and x-coordinate, y-axis and y-coordinate). • To interpret coordinate values of points on a coordinate plane. • To understand a rational number as a point on the number line. • To extend number line diagrams and coordinate axes to represent points on the line and in the plane with negative number coordinates. • To understand that the signs of numbers in ordered pairs indicate locations in quadrants of the coordinate plane. • To recognize that when two ordered pairs differ only by signs, the locations of the points are related by reflections across one or both axes. • To use coordinates and absolute value to find distances between points with the same first coordinate or the same second coordinate.

continues

MONTESSORI LESSONS	PURPOSES
Graphing • Polygons • Four Quadrants • Linear Equations	• To draw polygons in the coordinate plane using the coordinates for the vertices. • To use coordinates to find the length of a side of a polygon joining points with the same first coordinate or the same second coordinate.
Problem Solving • Teacher-Created or Purchased Cards • Experiences in the Classroom	• To understand coordinate values in the context of a real-world or mathematical problem. • To represent real-world and mathematical problems by graphing points in the first quadrant of a coordinate plane. • To apply knowledge about polygons on coordinate planes to real world and mathematical situation. • To graph points in all four quadrants of the coordinate plane to solve real-world and mathematical problems.

ASSESSMENT VOCABULARY

LATER SERIES

absolute value	origin	Cognitive Verbs
axis/axes	pair	apply
coordinate	plane	arrange
coordinate axes	point	define
coordinate plane	polygon	graph
coordinate system	quadrant	interpret
direction	rational number	locate
distance	real-world problem	recognize
first	reflection	relate
first coordinate	represent	represent
first quadrant	second (ordinal number)	solve
four	second coordinate	understand
graph	side	
intersection/intersecting	signed number	
length	travel	
line	two	
mathematical problem	vertex/vertices	
negative	x-axis	
number	x-coordinate	
number line	y-axis	
one	y-coordinate	
ordered pair	zero	

ASSESSMENT CONSIDERATIONS**LATER SERIES****Students will be asked to:****Coordinate plane and ordered pairs**

- Use a pair of perpendicular number lines, called axes, to define a coordinate system, with the intersection of the lines (the origin) arranged to coincide with the 0 on each line and a given point in the plane located by using an ordered pair of numbers, called its coordinates. (5.G.A.1)
- Understand that the first number in a coordinate system indicates how far to travel from the origin in the direction of one axis, and the second number indicates how far to travel in the direction of the second axis, with the convention that the names of the two axes and the coordinates correspond (e.g., x-axis and x-coordinate, y-axis and y-coordinate). (5.G.A.1)
- Interpret coordinate values of points on a coordinate plane. (5.G.A.2)
- Understand a rational number as a point on the number line. (6.NS.C.6)
- Extend number line diagrams and coordinate axes to represent points on the line and in the plane with negative number coordinates. (6.NS.C.6)
- Understand signs of numbers in ordered pairs as indicating locations in quadrants of the coordinate plane. (6.NS.C.6.B)
- Recognize that when two ordered pairs differ only by signs, the locations of the points are related by reflections across one or both axes. (6.NS.C.6.B)
- Use coordinates and absolute value to find distances between points with the same first coordinate or the same second coordinate. (6.NS.C.8)

Polygons

- Draw polygons in the coordinate plane given coordinates for the vertices. (6.G.A.3)
- Use coordinates to find the length of a side of a polygon by joining points with the same first coordinate or the same second coordinate. (6.G.A.3)

Word Problems

- Represent real world and mathematical problems by graphing points in the first quadrant of the coordinate plane. (5.G.A.2)
- Solve real-world and mathematical problems by applying the techniques of drawing polygons in coordinate planes. (6.G.A.3)
- Solve real-world and mathematical problems by graphing points in all four quadrants of the coordinate plane. (6.NS.C.8)

COMMON CORE STATE STANDARDS (CCSS.MATH.CONTENT)**GEOMETRY (G)****GRAPH POINTS ON THE COORDINATE PLANE TO SOLVE REAL-WORLD AND MATHEMATICAL PROBLEMS**

5.G.A.1	Use a pair of perpendicular number lines, called axes, to define a coordinate system, with the intersection of the lines (the origin) arranged to coincide with the 0 on each line and a given point in the plane located by using an ordered pair of numbers, called its coordinates. Understand that the first number indicates how far to travel from the origin in the direction of one axis, and the second number indicates how far to travel in the direction of the second axis, with the convention that the names of the two axes and the coordinates correspond (e.g., x-axis and x-coordinate, y-axis and y-coordinate).
5.G.A.2	Represent real world and mathematical problems by graphing points in the first quadrant of the coordinate plane, and interpret coordinate values of points in the context of the situation.
6.G.A.3	Draw polygons in the coordinate plane given coordinates for the vertices; use coordinates to find the length of a side joining points with the same first coordinate or the same second coordinate. Apply these techniques in the context of solving real-world and mathematical problems.

THE NUMBER SYSTEM (NS)**APPLY AND EXTEND PREVIOUS UNDERSTANDINGS OF NUMBERS TO THE SYSTEM OF RATIONAL NUMBERS**

6.NS.C.6	Understand a rational number as a point on the number line. Extend number line diagrams and coordinate axes familiar from previous grades to represent points on the line and in the plane with negative number coordinates.
6.NS.C.6.B	Understand signs of numbers in ordered pairs as indicating locations in quadrants of the coordinate plane; recognize that when two ordered pairs differ only by signs, the locations of the points are related by reflections across one or both axes.
6.NS.C.8	Solve real-world and mathematical problems by graphing points in all four quadrants of the coordinate plane. Include use of coordinates and absolute value to find distances between points with the same first coordinate or the same second coordinate.

NOTES

Grade 7 & 8 Science Curriculum Outline

Essential Skills	Guiding Questions	NC Standard Course of Study	
		7th Grade	8th Grade
		Physics & Energy	
		Forces & Motion	
Applies Newton's laws and force interactions to design solutions and investigations; analyzes data to explore motion, mass, and force relationships; and uses evidence to explain gravitational, electric, and magnetic forces, including interactions at a distance.	<i>How can understanding Newton's laws and the interplay of forces guide the creation of innovative solutions to real-world challenges involving motion?</i> <i>What can we learn about the fundamental relationships between motion, mass, and force by carefully analyzing experimental data?</i> <i>In what ways does the evidence we gather help us explain the seemingly "action-at-a-distance" nature of gravitational, electric, and magnetic forces and their influence on the world around us?</i>	7.P.1 Understand motion, the effects of forces on motion and the graphical representations of motion. <i>7.P.1.1 Explain how the motion of an object can be described by its position, direction of motion, and speed with respect to some other object.</i> <i>7.P.1.2 Explain the effects of balanced and unbalanced forces acting on an object (including friction, gravity and magnets).</i> <i>7.P.1.3 Illustrate the motion of an object using a graph to show a change in position over a period of time.</i> <i>7.P.1.4 Interpret distance versus time graphs for</i>	

		<i>constant speed and variable motion.</i>	
		Matter: Properties and Change	
Develops and uses models to describe atomic structure, chemical reactions, and changes in matter; analyzes data to identify evidence of chemical change; evaluates the role of natural resources in creating synthetic materials; and applies understanding of thermal energy in the design and testing of chemical-based devices.	<i>How can we use models to visualize and predict the transformations that occur during chemical reactions and changes in the structure of matter?</i> <i>What kinds of data provide compelling evidence that a chemical change has taken place, and how can we analyze this data to understand the nature of the transformation?</i> <i>Considering the origin and processing of natural resources, how can our understanding of chemical principles inform the sustainable design and testing of new materials and chemical-based technologies that manage thermal energy effectively?</i>		8.P.1 Understand the properties of matter and changes that occur when matter interacts in an open and closed container. <i>8.P.1.1 Classify matter as elements, compounds, or mixtures based on how the atoms are packed together in arrangements.</i> <i>8.P.1.2 Explain how the physical properties of elements and their reactivity have been used to produce the current model of the Periodic Table of elements.</i> <i>8.P.1.3 Compare physical changes such as size, shape and state to chemical changes that are the result of a chemical reaction to include changes in temperature, color, formation of a gas or precipitate.</i> <i>8.P.1.4 Explain how the idea of atoms and a balanced chemical equation support</i>

			<i>the law of conservation of mass.</i>
		Energy: Conservation & Transfer	
Analyzes and models the relationships between kinetic and potential energy, applies scientific principles to investigate and design solutions for thermal energy transfer, and constructs evidence-based arguments to explain how energy is transferred and conserved in physical systems. Defines criteria and constraints for design problems, evaluates and compares solutions using data and systematic processes, and develops models to test, modify, and optimize designs based on scientific principles and real-world impacts.	<i>How can we model the dynamic interplay between kinetic and potential energy to predict and explain the behavior of physical systems?</i> <i>What scientific principles govern the transfer of thermal energy, and how can we apply these principles to design and evaluate effective solutions for heating or cooling systems?</i> <i>What evidence supports the principle of energy conservation, and how can we construct logical arguments to explain the various ways energy is transferred and transformed within physical systems?</i> <i>How do we effectively define the essential criteria and constraints of a design problem to ensure the development of a relevant and achievable solution?</i> <i>What systematic processes and data analysis techniques can we employ to objectively evaluate and compare the effectiveness and</i>	7.P.2 Understand forms of energy, energy transfer and transformation and conservation in mechanical systems. <i>7.P.2.1 Explain how kinetic and potential energy contribute to the mechanical energy of an object.</i> <i>7.P.2.2 Explain how energy can be transformed from one form to another (specifically potential energy and kinetic energy) using a model or diagram of a moving object (roller coaster, pendulum, or cars on ramps as examples).</i> <i>7.P.2.3 Recognize that energy can be transferred from one system to another when two objects push or pull on each other over a distance (work) and electrical circuits require a complete loop through which an electrical current can pass.</i>	8.P.2 Explain the environmental implications associated with the various methods of obtaining, managing, and using energy resources. <i>8.P.2.1 Explain the environmental consequences of the various methods of obtaining, transforming and distributing energy.</i> <i>8.P.2.2 Explain the implications of the depletion of renewable and nonrenewable energy resources and the importance of conservation.</i>

	<i>efficiency of different design solutions?</i> <i>In what ways can we use models to iteratively test, modify, and optimize designs, taking into account relevant scientific principles and their potential real-world impacts?</i>	<i>7.P.2.4 Explain how simple machines such as inclined planes, pulleys, levers and wheel and axles are used to create mechanical advantage and increase efficiency.</i>	
		Geology & Geography	
		Earth Systems, Structure and Processes	
Develops and uses models and data to explain Earth's dynamic systems, including the cycling of materials and water, the flow of energy driving geoscience processes, and the role of plate motion, weather patterns, and global circulation in shaping Earth's surface and climate. Analyzes data, constructs explanations, and develops models to understand how resource availability, interactions among organisms, and changes in ecosystem components impact populations, energy flow, and matter cycling; evaluates design solutions for supporting biodiversity and ecosystem health.	<i>How can models and data help us understand the interconnectedness of Earth's dynamic systems, such as the cycling of materials and water, and the flow of energy that drives them?</i> <i>In what ways do large-scale processes like plate motion, weather patterns, and global circulation interact to shape Earth's surface and influence its climate over various timescales?</i> <i>How can we use scientific evidence to explain the causes and consequences of changes within Earth's dynamic systems, and what implications do these</i>	<i>7.E.1 Understand how the cycling of matter (water and gases) in and out of the atmosphere relates to Earth's atmosphere, weather and climate and the effects of the atmosphere on humans.</i> <i>7.E.1.1 Compare the composition, properties and structure of Earth's atmosphere to include: mixtures of gases and differences in temperature and pressure within layers.</i> <i>7.E.1.2 Explain how the cycling of water in and out of</i>	<i>8.E.1 Understand the hydrosphere and the impact of humans on local systems and the effects of the hydrosphere on humans.</i> <i>8.E.1.1 Explain the structure of the hydrosphere including: water distribution on earth; local river basins and water availability.</i> <i>8.E.1.2 Summarize evidence that Earth's oceans are a reservoir of nutrients, minerals, dissolved gases, and life forms: estuaries, marine ecosystems, upwelling, behavior of gases</i>

	<i>changes have for the planet and its inhabitants?</i> <i>How do the availability of resources and the complex interactions among organisms influence the dynamics of populations, the flow of energy, and the cycling of matter within an ecosystem?</i> <i>What kinds of data can we analyze and what models can we develop to explain how changes in different ecosystem components impact its overall health and stability?</i> <i>Based on our understanding of ecological principles, how can we evaluate the effectiveness of different design solutions aimed at supporting biodiversity and promoting long-term ecosystem health?</i>	<i>the atmosphere and atmospheric conditions relate to the weather patterns on Earth.</i> <i>7.E.1.3 Explain the relationship between the movement of air masses, high and low pressure systems, and frontal boundaries to storms (including thunderstorms, hurricanes, and tornadoes) and other weather conditions that may result.</i> <i>7.E.1.4 Predict weather conditions and patterns based on information obtained from: weather data collected from direct observations and measurement (wind speed and direction, air temperature, humidity and air pressure); weather maps, satellites and radar; cloud shapes and types and associated elevation.</i> <i>7.E.1.5 Explain the influence of convection, global winds and the jet stream on weather and climatic conditions.</i> <i>7.E.1.6 Conclude that the</i>	<i>in the marine environment, value and sustainability of marine resources, deep ocean technology and understandings gained.</i> <i>8.E.1.3 Predict the safety and potability of water supplies in North Carolina based on physical and biological factors, including: temperature, dissolved oxygen, pH, nitrates and phosphates, turbidity, and bioindicators.</i> <i>8.E.1.4 Conclude that the good health of humans requires: monitoring of the hydrosphere, water quality standards, methods of water treatment, maintaining safe water quality, and stewardship.</i>
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		<i>good health of humans requires: monitoring the atmosphere, maintaining air quality and stewardship.</i>	
		Earth History	
Develops and uses models to explain the Earth-sun-moon system, gravitational motion in the solar system and galaxies, and analyzes data to understand the scale of solar system objects; constructs explanations using evidence from rock strata to interpret Earth's 4.6-billion-year history.	<i>How can we use models to effectively explain the motions and interactions within the Earth-sun-moon system and the broader solar system, governed by gravitational forces?</i> <i>What does the analysis of data regarding solar system objects reveal about their scale, properties, and relationships within our cosmic neighborhood?</i> <i>How can the evidence preserved in Earth's rock strata be used to construct comprehensive explanations of the major events and transformations that have occurred throughout its 4.6-billion-year history?</i>		8.E.2 Understand the history of Earth and its life forms based on evidence of change recorded in fossil records and landforms. <i>8.E.2.1 Infer the age of Earth and relative age of rocks and fossils from index fossils and ordering of rock layers (relative dating and radioactive dating).</i> <i>8.E.2.2 Explain the use of fossils, ice cores, composition of sedimentary rocks, faults, and igneous rock formations found in rock layers as evidence of the history of the Earth and its changing life forms.</i>
		Biology & Ecology	
		Structure and Functions of Living Organisms	

Investigates and models how living things are made of cells and how cell structures and systems work together to support life; constructs explanations and arguments based on evidence to describe growth, reproduction, energy flow, and behavior in organisms; and synthesizes information on how internal and external factors affect organism function and survival.	<i>How do the structures and systems within cells work together as a foundation to support the diverse functions and processes of living organisms, and how can we model these complex interactions?</i> <i>What evidence allows us to explain the fundamental life processes of growth, reproduction, energy flow, and behavior in organisms, and how can we construct compelling arguments based on this evidence?</i> <i>In what ways do internal mechanisms and external environmental factors interact to influence the function and ultimately the survival of individual organisms and entire species?</i>	7.L.1 Understand the processes, structures and functions of living organisms that enable them to survive, reproduce and carry out the basic functions of life. 7.L.1.1 Compare the structures and life functions of single-celled organisms that carry out all of the basic functions of life including: <i>Euglena</i>, <i>Amoeba</i>, <i>Paramecium</i>, and <i>Volvox</i>. 7.L.1.2 Compare the structures and functions of plant and animal cells, including major organelles (cell membrane, cell wall, nucleus, chloroplasts, mitochondria, and vacuoles). 7.L.1.3 Summarize the hierarchical organization of multicellular organisms from cells to tissues to organs to systems to organisms. 7.L.1.4 Summarize the general functions of the major systems of the human body (digestion, respiration, reproduction, circulation, and excretion) and ways	8.L.1 Understand the hazards caused by agents of diseases that affect living organisms. 8.L.1.1 Summarize the basic characteristics of viruses, bacteria, fungi and parasites relating to the spread, treatment and prevention of disease. 8.L.1.2 Explain the difference between epidemic and pandemic as it relates to the spread, treatment and prevention of disease. 8.L.2 Understand how biotechnology is used to affect living organisms. 8.L.2.1 Summarize aspects of biotechnology including: specific genetic information available, careers, economic benefits to North Carolina, ethical issues, and implications for agriculture.
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		<i>that these systems interact with each other to sustain life.</i>	
		Ecosystems	
Analyzes data, constructs explanations, and develops models to understand how resource availability, interactions among organisms, and changes in ecosystem components impact populations, energy flow, and matter cycling; evaluates design solutions for supporting biodiversity and ecosystem health.	<i>How do the interconnected factors of resource availability, interspecies relationships, and alterations within an ecosystem drive changes in population sizes, the movement of energy, and the cycling of essential materials?</i> <i>What kinds of data can we analyze and what types of models can we build to explain and predict the consequences of disturbances to an ecosystem's components and processes?</i> <i>Based on our understanding of ecological principles, how can we critically evaluate the effectiveness of various design solutions aimed at preserving biodiversity and promoting the long-term health and resilience of ecosystems?</i>		8.L.3 Understand how organisms interact with and respond to the biotic and abiotic components of their environment. <i>8.L.3.1 Explain how factors such as food, water, shelter and space affect populations in an ecosystem.</i> <i>8.L.3.2 Summarize the relationships among producers, consumers, and decomposers including the positive and negative consequences of such interactions including: coexistence and cooperation, competition (predator/prey), Parasitism, and mutualism</i> <i>8.L.3.3 Explain how the flow of energy within food webs is interconnected with the cycling of matter (including water, nitrogen, carbon dioxide and oxygen).</i>

Evolution & Genetics			
Analyzes data and constructs explanations to describe how the fossil record, anatomical and embryological similarities, and genetic variation provide evidence for evolution; uses models, scientific ideas, and mathematical representations to explain natural selection, and evaluates how technology influences inheritance and traits in organisms. Develops and uses models to explain how genetic mutations can impact protein function and how the type of reproduction—sexual or asexual—affects genetic variation in offspring.	<i>What key patterns and similarities observed in the fossil record, comparative anatomy and embryology, and genetic variation provide compelling evidence for the theory of evolution?</i> <i>How can we use models, scientific principles like natural selection, and mathematical representations to explain the mechanisms driving evolutionary change in populations over time?</i> <i>In what ways does technology intersect with our understanding of inheritance and traits, and what are the ethical and scientific implications of influencing these aspects in organisms?</i> <i>How can we use models to illustrate the relationship between genetic mutations at the DNA level and their potential impacts on the structure and function of proteins within an organism?</i> <i>In what fundamental ways do sexual and asexual reproduction differ in their mechanisms, and how do these differences lead to varying levels of genetic variation among offspring?</i>	7.L.2 Understand the relationship of the mechanisms of cellular reproduction, patterns of inheritance and external factors to potential variation among offspring. 7.L.2.1 Explain why offspring that result from sexual reproduction (fertilization and meiosis) have greater variation than offspring that result from asexual reproduction (budding and mitosis). 7.L.2.2 Infer patterns of heredity using information from Punnett squares and pedigree analysis. 7.L.2.3 Explain the impact of the environment and lifestyle choices on biological inheritance (to include common genetic diseases) and survival.	8.L.4 Understand the evolution of organisms and landforms based on evidence, theories and processes that impact the Earth over time. 8.L.4.1 Summarize the use of evidence drawn from geology, fossils, and comparative anatomy to form the basis for biological classification systems and the theory of evolution. 8.L.4.2 Explain the relationship between genetic variation and an organism's ability to adapt to its environment.

	<i>What are the potential advantages and disadvantages of genetic variation within a population, and how is this variation influenced by the mode of reproduction and the occurrence of mutations?</i>		
		Molecular Biology	
Demonstrates how the chemical composition of food provides organisms with both the energy needed for life processes and the essential molecules required for growth, repair, and overall health, including the interconnected roles of diet, exercise, respiration, and digestion in maintaining a healthy body.	<i>In what ways does the specific chemical makeup of the food we consume directly relate to the energy our bodies can utilize for essential life processes, and what types of molecules serve as the primary building blocks for growth and repair?</i> <i>How are the processes of digestion and respiration interconnected in their roles of extracting energy and necessary molecules from food, and how does a balanced diet and regular exercise influence the efficiency of these systems and overall health?</i> <i>Considering the diverse nutritional needs of different organisms (including plants), how does the chemical composition of their food</i>		8.L.5 Understand the composition of various substances as it relates to their ability to serve as a source of energy and building materials for growth and repair of organisms. <i>8.L.5.1 Summarize how food provides the energy and the molecules required for building materials, growth and survival of all organisms (to include plants).</i> <i>8.L.5.2 Explain the relationship among a healthy diet, exercise, and the general health of the body (emphasis on the relationship between respiration and digestion).</i>

	<i>sources enable them to obtain the energy and building materials necessary for their specific life functions, growth, and survival?</i>		
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Encompass Montessori | Middle School Program Schedule | Grades 7 & 8

	Monday	Tuesday	Wednesday	Thursday	Friday
8:05-8:15	Arrival	Arrival	Arrival	Arrival	Arrival
8:15-8:50 (35 mins)	Open Work	Open Work	Colloquium (60 mins)	Open Work	Open Work
8:55-11:20 (140 mins)	Integrated Studies	Integrated Studies		Integrated Studies	Integrated Studies
11:20-12:15 (55 mins)	Lunch & Recess	Lunch & Recess	Lunch & Recess	Lunch & Recess	Lunch & Recess
12:20-12:55 (35 mins)	Solo Time & Conferencing	Solo Time & Conferencing	Solo Time & Conferencing	Solo Time & Conferencing	Solo Time & Conferencing
1:00-2:40 (100 mins)	Integrated Studies	Self-Expressions	Integrated Studies (80 mins)	Self-Expressions	Integrated Studies
2:45- 3:10 (25 mins)	Reflection & Planning	Reflection & Planning	Advisory (45 mins)	Reflection & Planning	Reflection & Planning
3:15-3:25	Dismissal	Dismissal	Dismissal	Dismissal	Dismissal

Encompass Montessori Charter School

2028-2029 School Calendar

July '28						
Su	M	Tu	W	Th	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

August '28						
Su	M	Tu	W	Th	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

September '28						
Su	M	Tu	W	Th	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

October '28						
Su	M	Tu	W	Th	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

November '28						
Su	M	Tu	W	Th	F	S
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5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

December '28						
Su	M	Tu	W	Th	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

January '29						
Su	M	Tu	W	Th	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

February '29						
Su	M	Tu	W	Th	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28			

March '29						
Su	M	Tu	W	Th	F	S
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4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

April '29						
Su	M	Tu	W	Th	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

May '29						
Su	M	Tu	W	Th	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

June '29						
Su	M	Tu	W	Th	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

TEACHER WORKDAYS/NO SCHOOL FOR STUDENTS

HOLIDAYS/INTERSESSIONS

FIRST DAY OF SCHOOL FOR STUDENTS

HALF DAY for teacher conferences

**LAST DAY OF SCHOOL-HALF DAY –
REPORT CARDS –
PTO MEETINGS**

This calendar reflects 185 instructional days.

Charter School Required Signature Certification

***Note:** Outlined below is a list of areas that must be certified by the proposed Board of Directors. Signatures of all Board Members must be provided in Section VII. The Board Chair must certify and provide signature in Section VIII. Any section 'Not Applicable' to the proposed charter school, indicate below with N/A and provide a brief explanation for providing such response in the corresponding text boxes.*

Serving on a public charter school board is a position of public trust and board members of a North Carolina public charter school; you are responsible for ensuring the quality of the school's entire program, competent stewardship of public funds, the school's fulfillment of its public obligations, all terms of its charter, and understanding/overseeing all third-party contracts with individuals or companies.

I. School Information

Name of charter school

Encompass Montessori

II. Selected Board Attorney

❖ The selected Board Attorney has reviewed with the full Board of Directors, listed within the application, all the governance documents and liabilities associated with being on the Board of a Non-Profit Corporation.

No: ☐

Yes: ☒

Not yet identified: ☐

Name of Selected Board Attorney:

Matthew Tilley

Business/Law Firm Name: Womble Bond Dickinson

Business Address: 301 S. College Street
Suite 3500
Charlotte, NC, US 28202

Telephone No.: 704.350.6361

	E-mail address: matthew.tilley@wbd-us.com
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III. Selected Board Auditor

❖ The selected Board Auditor has reviewed with the full Board of Directors, listed within the application, all the items required for the annual audit and 990 preparations. No: ☐ Yes: ☐ Not yet identified: ☐	Name of Selected Board Auditor: Jay Sharpe
	Business/Firm Name: Sharpe Patel PLLC
	Business Address: 5510 Six Forks Road, Suite 140 Raleigh, NC 27609
	Telephone No.: 919-341-4187
	Email address: jay@sharpepatelcpa.com

IV. Selected CMO/EMO

❖ If contracting with a CMO/EMO, that the selected management company has reviewed with the full Board of Directors, listed within the application, all the items required and the associated management contract and operations. No: ☒ Yes: ☐ Not yet identified: ☐	Name of Selected Management Organization: Click or tap here to enter text.
	Business Address: Click or tap here to enter text.
	Telephone No.: Click or tap here to enter text.
	Email address: Click or tap here to enter text.

V. Selected Financial Management Service Provider

- ❖ If contracting with a financial management service provider, the selected financial service provider has reviewed with the full Board of Directors, listed within the application, all the financial processes and services provided.

No: X **Yes: ☐** **Not yet identified: ☐**

Name of Selected Financial Management Service Provider:

Click or tap here to enter text.

Business Address: Click or tap here to enter text.

Telephone No.: Click or tap here to enter text.

Email address: Click or tap here to enter text.

VI. Selected Infinite Campus Service Provider

- ❖ If the proposed Board of Directors, listed within the application, is contracting with a service provider to operate PowerSchool, that service provider has reviewed all of the financial processes and services provided.

No: X **Yes: ☐** **Not yet identified: ☐**

Name of Selected PS or IC Service Provider:

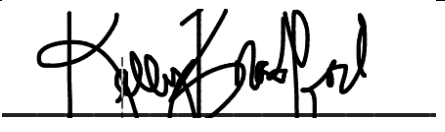
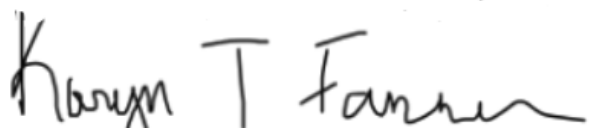
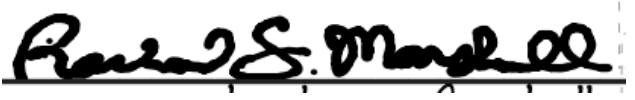
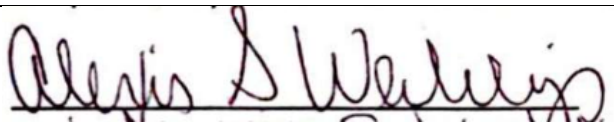
Click or tap here to enter text.

Business Address: Click or tap here to enter text.

Telephone No.: Click or tap here to enter text.

Email address: Click or tap here to enter text.

VII. Signatures of All Charter Board Members

1. 	2. 
3. 	4. 
	5. 
6.	7.
8.	9.
10.	11.
12.	13.
14.	15.

VIII. Certification of Board Chair

I, Katie Brown, as Board Chair, certify that each Board Member has reviewed and participated in the selection of the individuals and vendors attached to this document as evidenced by the full Board of Director signatures outlined above. The information I am providing to the North Carolina Charter Schools Review Board as [Click or tap here to enter text](#). Charter School is true and correct in every respect.

Signature

A handwritten signature in black ink that reads "Katie Brown". The signature is written in a cursive, flowing style.

Date: Apr 24, 2026

ALEXIS WEDDINGS

Wendell, NC • (919) 710-2713 • alexis.weddings@yahoo.com

PROFESSIONAL SUMMARY

Results-driven professional with a strong background in operations management, accounting, and business development. Proven ability to improve operational efficiency, strengthen client relationships, and drive business growth. Skilled in financial management, QuickBooks Online (QBO), and strategic planning, with a strong focus on aligning business operations to client needs.

CORE COMPETENCIES

- Operations & Organizational Management
 - Financial Analysis & P&L Management
 - QuickBooks Online (QBO) Certified
 - Business Development & Client Relations
 - Process Improvement
 - Team Leadership & Performance Management
 - Strategic Planning
-

PROFESSIONAL EXPERIENCE

Narron CPA — Accountant

February 2025 – Present

- Meet with business clients to assess financial and operational needs and deliver tailored solutions
- Manage and optimize client accounting systems using QuickBooks Online (QBO)
- Oversee internal operations to improve efficiency and workflows
- Provide financial insights to support business growth and decision-making
- Engage in community outreach to build and strengthen client relationships

Acadia NorthStar (A Prestige School Solution) — Operations Manager

January 2015 – November 2024

- Directed daily operations and improved organizational efficiency through strategic planning

- Increased customer retention by 30% through enhanced service and engagement strategies
- Managed staffing, performance tracking, and process improvements
- Partnered with leadership to address evolving customer and workforce needs
- Recruited, trained, and developed high-performing teams

Southeast Atlantic Peterbilt — Controller / CFO

June 2014 – January 2015

- Prepared and analyzed financial statements and reports
- Managed cash flow, forecasting, and financial controls
- Ensured compliance with accounting standards and regulations
- Advised leadership on financial strategy and planning

BB&T — Account Executive

January 2004 – August 2008

- Built and maintained strong client relationships to drive revenue growth
- Generated leads and expanded market opportunities
- Managed client accounts and resolved issues to ensure satisfaction

BB&T — Teller Supervisor

- Supervised teller operations and ensured transaction accuracy
- Trained and mentored staff to improve performance
- Managed cash flow and maintained compliance with banking procedures

EDUCATION

Bachelor of Science in Business Administration

North Carolina State University

Minor in Accounting • Concentration in Finance

CERTIFICATIONS

- QuickBooks Online (QBO) Certified

PROFESSIONAL AFFILIATIONS

- Chamber Champion — Zebulon Chamber of Commerce
- Member — Wendell Chamber of Commerce
- Member — Triangle East Chamber of Commerce

- Member — East Wake Women's Business Alliance

Karyn T Farmer

Nonprofit Executive | Strategic Consultant | Community Impact Leader

CORE COMPETENCIES

- Strategic & Executive Leadership
- Grant Writing
- Funding Development
- Program Management
- Cybersecurity Compliance & Risk Management
- STEAM Curriculum & Workforce Training
- Marketing & Brand Strategy
- Communication & Public Speaking
- Personnel Development

EDUCATION

Cornell University

Graduate Certificate, Women in Entrepreneurship

Hampton University: B.S.,
Mathematics, Minor – Comp Sci

University of Maryland Global
Campus: M.S, Information Security
Coursework

HONORS & AFFILIATIONS

- 100 Most Powerful Women, One Woman International 2021
- Two-time Amazon Best Selling Launch, Anthology Co-Author (*Give Me a Minute* and *Unstoppable*)
- Delta Sigma Theta Sorority, Inc.
- Garden Club of North Carolina, Local Community Outreach Chair

NONPROFIT LEADERSHIP ROLES

- Board of Directors, Chamber of Commerce (Zebulon, NC)
- Founding Board Vice President, Encompass Missionary School

EXECUTIVE SUMMARY: Mission-driven nonprofit executive and strategic consultant with 25+ years of leadership in cybersecurity, IT program management, workforce development, and community-based initiatives. Proven record of building high-performing teams, securing and managing grant funding, and translating complex technical expertise into sustainable nonprofit impact. *Recognized for aligning strategy, compliance, and partnerships to drive funding growth and measurable community outcomes.*

EXPERIENCE & IMPACT:

SEED Community Foundation N. Carolina & Washington, DC **Community Development Executive Jan 2021 – Present**

Lead community-focused programs through strategic planning, stakeholder engagement, and sustainable resource development. Design and execute organizational strategy; manage budgets, donors, volunteers, and grant portfolios. Secure and administer grant funding while expanding partnerships with businesses, residents, and civic leaders. Advance youth-led sustainability initiatives and develop STEAM curriculum, instruction, and success metrics for underserved communities. Lead and manage community gardens.

Motorola Solutions Washington, DC **Cybersecurity Director Jun 2013 – Aug 2021**

Owned executive-level CIO relationships and led training and risk-based cybersecurity strategy, architecture, and remediation. Directed cross-functional security teams delivering secure, scalable solutions aligned to client requirements. Conducted risk assessments and vulnerability testing; briefed C-suite on governance and incident readiness. Managed program funding and contracts to deliver outcomes on time and within scope.

Booz Allen Hamilton McLean, VA **Senior Associate / Principal Lead Apr 1993 – Sept 2012**

Senior advisor to federal civilian agencies on protecting mission-critical IT environments. Led cybersecurity assessments, remediation planning, and enterprise security programs. Ghost author for National Institute of Science and Technology (NIST) client in development of NIST SP 800-53A, contributing to nationally adopted security control assessment standards.

KATIE E. BROWN

949.400.6175 | katie.e.brown@gmail.com | www.katieEbrown.com

EDUCATION

Doctor of Philosophy University of North Carolina at Charlotte Concentration: Curriculum & Instruction, Urban Education	2016
Master of Arts in Education University of Phoenix Concentration: Secondary Teacher Education	2008
Bachelor of Arts (<i>Magna Cum Laude</i>) University of California, San Diego Concentration: English Literature	2006

RESEARCH INTERESTS

Montessori in Urban Public Schools
Academic Achievement for Students of Color
Developmental Learning Environments

RESEARCH EXPERIENCE

Director of Research and Professional Learning National Center for Montessori in the Public Sector <i>Responsibilities:</i> Research design, grant writing, data collection and analysis, instrument development, dissemination, curation and development of face-to-face and online learning opportunities for adult learners	2021-present
Director of Professional Learning & Research Associate National Center for Montessori in the Public Sector <i>Responsibilities:</i> Curation and development of face-to-face and online learning opportunities for adult learners, grant writing, data collection and analysis, instrument development, dissemination	2019-2021
DC Regional Coordinator & Research Associate National Center for Montessori in the Public Sector <i>Responsibilities:</i> Grant writing, data collection and analysis, instrument development, dissemination, teacher education	2016-2019
Research Associate National Center for Montessori in the Public Sector <i>Responsibilities:</i> Proposal development, research site identification and coordination, data collection and analysis	2015-2016

Freedom School Evaluator**2015**

University of North Carolina at Charlotte, Charlotte, NC
 College of Education, Department of Middle, Secondary, and K-12 Education
Responsibilities: Data collection and assessment for program evaluation

Graduate Research Assistant**2014 – 2016**

University of North Carolina at Charlotte, Charlotte, NC
 College of Education, Department of Middle, Secondary, and K-12 Education
Responsibilities: Research and publication, conference presentations, assess student work, develop supplemental course materials, seek funding sources, write grant proposals

Doctoral Fellow**2014 – 2015**

The Urban Education Collaborative at UNC Charlotte, Charlotte, NC
Responsibilities: Grant writing, research and publication, conference planning and execution

PUBLICATIONS**REFEREED JOURNAL ARTICLES**

Brown, K. E., Woodford, L., & Powell, K. (2025). Reading achievement in Arizona public Montessori schools. *Journal of Montessori Research*, 11(2), 1-15.

Parker, I., **Brown, K.**, & Frazer, A. (2025). Re-envisioning school: Lessons on school reform from Montessori district schools. *Journal of Scholarship and Practice*, 22(1), 65-80.

Murray, A. K., **Brown, K.**, & Barton, P. (2021). Montessori education at a distance, part 1: A survey of Montessori educators' response to a global pandemic. *Journal of Montessori Research*, 7(1), 1-29.

Murray, A. K., **Brown, K.**, & Barton, P. (2021). Montessori education at a distance, part 2: A mixed methods examination of Montessori educators' response to a global pandemic. *Journal of Montessori Research*, 7(1), 31-50.

Brown, K. E., & Lewis, C. W. (2017). A comparison of reading and math achievement for African American third grade students in Montessori and other magnet schools. *Journal of Negro Education*, 86(4), 439-448.

Debs, M., & **Brown, K. E.** (2017). Students of color and public Montessori schools: A review of the literature. *Journal of Montessori Research*, 3(1), 1-15. doi: <https://doi.org/10.17161/jomr.v3i1.5859>

Byker, E. J., Coffey, H., Harden, S., Good, A., Heafner, T., **Brown, K. E.**, & Holzberg, D. (2017). Hoping to teach someday? Inquire within: Examining inquiry-based learning with first-semester undergrads. *Journal of Inquiry and Action in Education*, 8(2), 54-80.

Triplett, N. P., Bryant, A. C., Steele, A. S. L., **Brown, K. E.**, Ardrey, T., Allen, A. & Lewis, C. W. (2016). Discipline disproportionality, student achievement and the reauthorization of the Elementary and Secondary Education Act (ESEA). *Educational Law and Policy Review*, 3, 209-240.
http://www.educationlawconsortium.org/yahoo_site_admin/assets/docs/ELPR_Vol_3.95111412.pdf

Cossentino, J., & **Brown, K. E.** (2015). Assessing creativity and critical thinking in schools: Montessori as a holistic intervention. *Association Montessori Internationale Journal, 2014-2015*, 229-232.

Brown, K. E., & Steele, A. S. L. (2015). Racial discipline disproportionality in Montessori and traditional schools: A comparative study using the Relative Rate Index. *Journal of Montessori Research, 1*(1), 14-27.
doi: <http://dx.doi.org/10.17161/jomr.v1i1.4941>

Harden, S. B., McDaniel, P. N., Smith, H. A., Zimmern, E., & **Brown, K. E.** (2015). Speaking of change in Charlotte, North Carolina: How museums can shape immigrant receptivity in a community navigating rapid cultural change. *Museums and Social Issues, 10*(2), 117-133.

BOOK CHAPTERS (REFEREED)

Brown, K. E., & Ungerer, R. (2023). Montessori education in the United States. In A. Murray, E. Tebano Ahlquist, M. McKenna, & M. Debs (Eds.), *The Bloomsbury handbook of Montessori Education*. New York, NY: Bloomsbury.

Coffey, H., Harden, S. B., **Brown, K. E.,** & Williams, M. (2017). Civic minor in urban youth and communities: A new service-learning curriculum disrupts traditional teacher education. In C. Crosby & F. Brockmeier (Eds.), *Handbook of research on community engagement in 21st century education*. Hershey, PA: IGI Global.

Byker, E. J., Coffey, H., Harden, S., Good, A., **Brown, K. E.,** Heafner, T., & Holzberg, D. (2016). Preparing teacher-scholars to inquire: Constructing the inquiry processing cycle. In D. Polly & C. Martin, *Handbook of research on teacher education and professional development*. Hershey, PA: IGI Global.

REFEREED CONFERENCE PROCEEDINGS

Brown, K. (2015). Following the children: Perspectives on diversity from Montessori teachers-in-training. *Proceedings of the 15th Annual UNC Charlotte Graduate Research Symposium*. Charlotte, NC.

Brown, K. (2014). Montessori: An early childhood education model for urban schools. *Proceedings of the 2014 International Conference on Urban Education* (pp. 92-96). <http://www.theicue.org/icue2014-highlights/>

BRIEFS

Brown, K. E. (2016). *Braided funding policy brief*. Washington, DC: National Center for Montessori in the Public Sector. <http://www.public-montessori.org/what-we-do/research/staff-publications>

Brown, K. E. (2015). *Research brief: Dropout prevention and recovery*. Charlotte, NC: The Urban Education Collaborative Research Clearinghouse. <http://thecollaborative.uncc.edu/research-clearinghouse/research-briefs>

Brown, K. E. (2015). *Policy brief: Discriminatory school policies and LGBTQ youth*. Charlotte, NC: The Urban Education Collaborative Research Clearinghouse. <http://thecollaborative.uncc.edu/research-clearinghouse/policy-briefs>

Brown, K. E. (2015). *Executive function and academic achievement for students of low socioeconomic status*. Charlotte, NC: The Urban Education Collaborative Research Clearinghouse. <http://thecollaborative.uncc.edu/research-clearinghouse/research-briefs>

Brown, K. E. (2015). *Montessori programs in urban schools: Policy and possibilities*. Charlotte, NC: The Urban Education Collaborative Research Clearinghouse. <http://thecollaborative.uncc.edu/research-clearinghouse/policy-briefs>

EDITORIALS (NON-REFEREED)

Brown, K. E. (2016). Foreword. *Urban Education Research and Policy Annuals*, 4(1), 4-5. <http://thecollaborative.uncc.edu/research-clearinghouse/uerpa-graduate-student-journal>

Brown, K. E. (2015). On the margins: LGBTQ youth in American schools. *Urban Education Research and Policy Annuals*, 3(1), 6-8. <http://thecollaborative.uncc.edu/research-clearinghouse/uerpa-graduate-student-journal>

NEWSLETTERS

Brown, K. E. , Murray, A. K., & Barton, P. (2021). Montessori teachers adapt to distance learning. *MontessoriPublic*, 5(2), 14-15. <https://www.montessoripublic.org/2021/02/montessori-teachers-adapt-to-distance-learning/>

Brown, K. E. , Murray, A. K., & Barton, P. (2020). Hands-on learning goes virtual. *MontessoriPublic*, 5(1), 3. <https://www.montessoripublic.org/2020/10/hands-on-learning-goes-virtual/>

Brown, K. E. (2016). Montessori academic progress: Redrawing the MAP. *MontessoriPublic*, 1(1), 17.

Brown, K. E. (2016). Women in STEM: The roots of the disparities in schools and in the workplace. *Good as Gold: The UNC Charlotte Urban Educators for Change Newsletter*, 2(1), 3. <http://twitdoc.com/57PR>

Brown, K. E. (2015). Are year-round schools an underrated option?. *Good as Gold: The UNC Charlotte Urban Educators for Change Newsletter*, 1(1), 5. <http://twitdoc.com/3Z7Z>

INVITED PUBLICATIONS

Harden, S. B., & **Brown, K. E.** (in press). Institutional and community engagement. *TESOL Encyclopedia of English Language Teaching*.

WORKING PAPERS

Cossentino, J., & **Brown, K. E.** (2017). What's going on in this (developmental) classroom? DERS working paper #1. Washington, DC: National Center for Montessori in the Public Sector. <https://www.ders-app.org/research/>

RESEARCH PRESENTATIONS

INTERNATIONAL CONFERENCES

White, J., Huang, L., & **Brown, K. E.** (2024, January). *Exploring Montessori education and charter school innovations: A comparative analysis of student outcomes and implications*. Paper presented at the International School Choice and Reform Conference. Madrid, Spain.

Brown, K. E., Dosmann, P., & Cossentino, J. (2017, July). *Creative potential in Montessori adolescent programs*. Poster presented at the International Montessori Congress. Prague, Czechia.

Brown, K. (2014, November). *Montessori: An early childhood education model for urban schools*. Paper presented at the 1st Biennial International Conference on Urban Education. Montego Bay, Jamaica.

NATIONAL CONFERENCES

Iruka, I., **Brown, K. E.**, & Liy, A. (2025, March). Ideal learning for all: Examining the experiences of children of color in ideal learning settings. Poster presented at the 2025 American Montessori Society Annual Conference. Denver, CO.

Brown, K. E., Woodford, L., & Powell, K. (2025, March). Reading achievement in Arizona public Montessori schools. Poster presented at the 2025 American Montessori Society Annual Conference. Denver, CO.

Brown, K. E., White, J., & Huang, L. (2024, March). *Exploring Montessori education and charter school innovations: A comparative analysis of student outcomes and implications*. Poster presented at the 2024 American Montessori Society Annual Conference. Orlando, FL.

Parker, I. D., Frazer, A., & **Brown, K. E.** (2023, March). *Public Montessori as a reform model: Questions and considerations for school districts*. Poster presented at the 2023 American Montessori Society Annual Conference. Boston, MA.

Parker, I. D., Frazer, A., & **Brown, K. E.** (2022, April). *Public Montessori as a reform model: Questions and considerations for school districts*. Poster presented at the 2022 Annual Meeting of the American Education Research Association. San Diego, CA.

Murray, A. K., **Brown, K. E.**, & Barton, P. (2021, April). *Montessori education's response to COVID-19 distance learning situation*. Poster presented at the 2021 Annual Meeting of the American Education Research Association.

Brown, K. E., Murray, A. K., & Barton, P. (2021, March). *Montessori at a distance: Distance Learning and Family Involvement during the COVID-19 pandemic*. Poster presented at the 2021 American Montessori Society Annual Conference.

Brown, K. E., & Lewis, C. W. (2018, April). *Reading and math achievement for African American elementary students in public Montessori versus traditional schools*. Paper presented at the 2018 Annual Meeting of the American Educational Research Association. New York, NY.

Brown, K. E., Dosmann, P., & Grabowski, K. (2018, March). *Executive function and creative potential in third grade Montessori students*. Poster presented at the American Montessori Society Annual Conference. Denver, CO.

Brown, K. E., & Lewis, C. W. (2017, April). *Reading and math achievement for African American third-grade students in public Montessori schools*. Paper presented at the 2017 Annual Meeting of American Educational Research Association. San Antonio, TX.

Murray, A. K., Culclasure, B., & **Brown, K. E.** (2017, March). *What does research say about Montessori theory and practice?* Presentation at the American Montessori Society Annual Conference. San Diego, CA.

Brown, K. E., & Dosmann, P. (2017, March). *Creativity in Montessori adolescent programs*. Poster presented at the American Montessori Society Annual Conference. San Diego, CA.

Brown, K. E., & Steele, A. S. L. (2016, April). *Racial discipline disproportionality in Montessori and traditional public schools*. Paper presented at the 2016 Annual Meeting of American Educational Research Association. Washington, DC.

Brown, K. E. (2016, April). *Racial diversity in Montessori charter schools*. Paper presented at the 2016 Annual Meeting of American Educational Research Association. Washington, DC.

Byker, E. J., Coffey, H. M., Good, A. J., Heafner, T. L., Harden, S., O'Brien, C. P., **Brown, K. E.**, Holzberg, D. G., Williams, B. (2016, April). *Constructing the inquiry processing cycle: Preparing prospective teacher candidates for success with constructivist practices*. Paper presented at the 2016 Annual Meeting of American Educational Research Association. Washington, DC.

Brown, K. (2016, March). *Reading and math achievement for third grade African American students in public Montessori schools*. Poster presented at the 2016 Annual Meeting of the American Montessori Society. Chicago, IL.

Brown, K. E., Triplett, N. P., Bryant, A. C., Ardrey, T., & Steele, A. S. L. (2015, November). *Culture matters: Conversations about race and culture in the classroom*. 3rd Annual Pursuing Extraordinary Outcomes in Public Education National Conference. Charlotte, NC.

Brown, K., & Adams, T. (2015, November). *LGBTQ youth in schools*. 3rd Annual Pursuing Extraordinary Outcomes in Public Education National Conference. Charlotte, NC.

Harden, S. B., McDaniel, P.N., Smith, H.A., & **Brown, K.** (2015, October). *Engaging museums: Joining forces to move a community toward immigrant receptivity*. Engagement Scholarship Consortium Annual Conference. State College (Penn State), PA.

Adams, T., **Brown, K.**, Covington, A., Robinson, D., & Talley-Matthews, S. (2014, October). *60 years post-Brown v. Board of Education and the hidden curriculum*. 2nd Annual Pursuing Extraordinary Outcomes in Public Education National Conference. Charlotte, NC.

REGIONAL CONFERENCES

Triplett, N. P., Bryant, A. C., **Brown, K. E.**, Steele, A. S., Ardrey, T., Allen, A., & Lewis, C. W. (2016, February). *Disproportional discipline, achievement, and the Every Student Succeeds Act (ESSA)*. 2016 Annual Meeting of the North Carolina Association for Research in Education. Charlotte, NC.

Brown, K., & Butler, B. R. (2015, February). *Discipline disproportionality and LGBTQ students: A perfect storm of discipline approach*. 2015 Annual Meeting of the North Carolina Association for Research in Education. Winston-Salem, NC.

STATE CONFERENCES

Brown, K. (2021, November). *Following all the children: An introduction to Child Study*. Presentation at the Virginia Montessori Association Conference.

Brown, K. (2021, October). *Following all the children: An introduction to Child Study*. Presentation at the Montessori Association of North Carolina Conference.

Brown, K. (2020, October). *Following all the children: An introduction to Child Study*. Presentation at the South Carolina Montessori Alliance Conference.

Golfus, K. (2013, March). *Reaching underachieving boys*. Presentation at the Palmetto State Gender Institute. Boiling Springs, SC.

Golfus, K. (2012, July). *Gender differences in the classroom*. Presentation at the South Carolina School Transformation Conference. North Charleston, SC.

Golfus, K. (2012, July). *Montessori: Education for life*. Presentation at the South Carolina School Transformation Conference. North Charleston, SC.

LOCAL PRESENTATIONS

Triplett, N. P., Bryant, A. C., Ardrey, T., Steele, A. S. L., & **Brown, K. E.** (2016, January). *White identity in the classroom: An interactive symposium*. Boldly Engaging Students through Culturally Relevant Teaching Conference. Charlotte, NC.

Brown, K. E., & Harden, S. B. (2015, April). *Service-learning as community engagement in TESOL contexts*. Poster presented at the Engaged Scholarship and Community Partnership Symposium. Charlotte, NC.

Brown, K. (2015, April). *Following the children: Perspectives on diversity from Montessori teachers-in-training*. Paper presented at the 15th Annual UNC Charlotte Graduate Research Symposium. Charlotte, NC.

Brown, K. (2015, March). *Montessori programs in U.S. public schools*. Poster session at Conversations in Urban Education. Charlotte, NC.

Golfus, K. (2014, March). *LGBTQQI students and discipline disproportionality*. Poster session at Conversations in Urban Education. Charlotte, NC.

INVITED PRESENTATIONS AND KEYNOTE ADDRESSES

Brown, K. (2024, January). *What families need to know about public Montessori schools*. Childhood Potential Virtual Conference.

Brown, K. (2023, November). *Montessori: 21st Century Perspectives on a 20th Century Approach*. Philosophy and Education Colloquium Series, Teachers College, Columbia University. New York, NY.

Brown, K. E. (2021, January). *From the margins to the mainstream: Montessori, education research, and racial justice*. Racial Justice and Equity in Montessori Research Conference. Lawrence, KS.

Brown, K. E. (2018, April). *Montessori and students of color: Reviewing the research and charting a path forward*. 2018 Virginia Montessori Association Spring Networking Event. Arlington, VA.

TEACHING EXPERIENCE

Adjunct Faculty

2018 – present

Whitworth University, Spokane, WA

Responsibilities: Teach master's-level online courses for public Montessori teachers and teacher candidates in Neurobiological Perspectives on Developmental Education; Early Intervention, Special Education, and Family Engagement; and Advanced Seminar on Language and Literacy

Montessori Teacher Residency Instructor

2016 – present

National Center for Montessori in the Public Sector, nationwide

Responsibilities: Lead online professional development for novice and aspiring public Montessori teachers in Neurobiological Perspectives on Developmental Education; Classroom Management, Special Education, and Family Engagement; and Advanced Seminar on Language and Literacy

Prospect for Success Graduate Assistant

2015 – 2016

University of North Carolina at Charlotte, Charlotte, NC

College of Education, Department of Middle, Secondary, and K-12 Education

Responsibilities: Co-teach EDUC 1100 Foundations of Education and Diversity in Schools, research and publication, coordinate field experience placements, develop supplemental course materials, assess student work

Teacher—Language Arts

2009-2012

Monroe Middle School, Monroe, NC

Teacher—English

2009

Kennedy Charter Public School, Charlotte, NC

Teacher—Independent Study Grades 6-12

2008-2009

Audeo Charter School, San Diego, CA

Student Teacher—English

2008

Serra High School, San Diego, CA

Instructional Assistant—Special Education

2007-2008

Audeo Charter School, San Diego, CA

Classroom Assistant

2006-2007

The Charter School of San Diego, San Diego, CA

INVITED GUEST LECTURES FOR UNIVERSITIES

Brown, K. (2015, August). *Montessori: Philosophy and practice*. Invited guest lecture in the School of Architecture at UNC Charlotte. Charlotte, NC.

Brown, K. (2014, October). *Montessori: Education for life*. Invited guest lecture in the Department of Middle, Secondary, and K-12 Education at UNC Charlotte. Charlotte, NC.

ADMINISTRATIVE EXPERIENCE

Admissions Counselor

2013 – 2014

Wingate University School of Pharmacy, Wingate, NC

Education Associate

2012 – 2013

South Carolina Department of Education, Columbia, SC

CERTIFICATES

South Carolina Teaching Certificate: English/Language Arts, Grades 6-12, 2012-2015

North Carolina Teaching License: English/Language Arts, Grades 6-12, 2009-2012

California Single-Subject Teaching Credential: English, 2008-2009

GRANTS

RESEARCH GRANTS

Lewis, C., **Brown, K.**, & Allen, A. (2014). *The STEM selfie project*, Kinder Morgan Foundation (\$3,600). Proposal not funded.

RESEARCH PRESENTATION GRANTS

Brown, K. (2018). The American Montessori Society. (\$1,000)

Brown, K. (2017). The American Montessori Society. (\$1,000)

Brown, K. (2016). The University of North Carolina at Charlotte Graduate and Professional Student Government. (\$400)

Golfus, K. (2014). *Montessori: An early childhood education model for urban schools*, a mini-grant from the American Montessori Society. (\$1,000)

TRAVEL GRANTS

Brown, K. (2015). The American Montessori Society. (\$200)

Brown, K. (2015). The University of North Carolina at Charlotte Graduate and Professional Student Government. (\$600)

Brown, K. (2014). The Urban Education Collaborative Doctoral Fellows Program. (\$1,000)

GRANT ADMINISTRATION

Golfus, K. (2012-2013). *Charter Schools Program state education agency planning and implementation grant: South Carolina*. Role: SEA Grant Administrator. (\$3,420,000).

MEDIA

Montessori and visual thinking strategies [podcast]. (2023, January). <https://bit.ly/3IMzHBo>

How to prime preschoolers for success [Interview]. (2019, October). <https://bit.ly/38Vv8dV>

New America Foundation: What it looks like to promote young children's growth and discovery [Interview]. (2019, April 12). <http://bit.ly/2HwoP3O>

SCEtv connections: Montessori schools [Television broadcast]. (2013, August 30). <http://bit.ly/1m5wX99>.

Montessori on the move in SC 2012-2013 [Television broadcast]. (2012, November 11). <http://bit.ly/1m5wX99>.

Montessori on the move in SC: Montessori teachers [Video file]. (2012, October 22).

<http://www.sctv.org/education/streamlinesc/>

Gender in the classroom [Video file]. (2012, September 27). <http://www.sctv.org/education/streamlinesc/>

Updating single-gender education [Radio broadcast]. (2012, July 16). *Speaking of Schools*. <http://bit.ly/1b3IkYu>

Montessori schools: A popular school choice option [Radio broadcast]. (2012, June 18). *Speaking of Schools*. <http://bit.ly/1aoPsAL>

SERVICE

TO THE UNIVERSITY

Volunteer, Pursuing Extraordinary Outcomes in Public Education	2015
Professional Consultation, ARCH 4101	2015
Teacher to Teacher Conference Volunteer	2015
Volunteer, International Conference on Urban Education	2014
Conference Co-Chair, Pursuing Extraordinary Outcomes in Public Education	2014
Vice President, Urban Educators for Change	2013-2014

TO THE ACADEMY

American Montessori Society Research Committee	2016-present
Urban Education Doctoral Student Mentoring Program, UNCC	2015-2019
Editor, <i>Urban Education Research and Policy Annuals</i>	2015-2016
Assistant Editor, <i>Good as Gold Newsletter</i>	2014-2015
Co-Editor, <i>Urban Education Research and Policy Annuals</i>	2014-2015

Reviewer

Petty, T., Good, A. & Putman, M. (Eds., in press). *Handbook of research on professional development for quality teaching and learning*. Hershey, PA: IGI Global.

Menand, H., & Robinson, D. (Eds., in press). *Strategies for increasing student success in urban classrooms*. Hershey, PA: IGI Global.

Crosby, C., & Brockmeier, F. (Eds., in press). *Handbook of research on community engagement in 21st century education*. Hershey, PA: IGI Global

TO THE COMMUNITY

Laura Holland Uzzell Foundation Board of Directors	2021-2024
Breakthrough Montessori Public Charter School Board of Trustees	2018-2024

American Montessori Society Research Committee	2016-present
Steering Committee, Montessori for Social Justice	2015-2016
Countryside Montessori School Board of Trustees	2015-2016
Freedom School Harambee Reader	2015
Volunteer, West Fest	2014
South Carolina Montessori Alliance Executive Board	2012-2013

HONORS AND AWARDS

Outstanding Doctoral Dissertation, 2 nd Place, American Montessori Society	2017
Outstanding Conference Submission Award, AERA Constructivist SIG	2016
Doctoral Fellow, The Urban Education Collaborative	2014
Phi Kappa Phi, University of North Carolina at Charlotte	2014
Staff Member of the Year, Wingate University School of Pharmacy	2014
Perfect Audit Award, Audeo Charter School	2009

MEMBERSHIPS

Montessori Association of North Carolina	2023-present
American Montessori Society	2014-present
American Educational Research Association	2013-2020
The Urban Education Collaborative	2013-2016
Urban Educators for Change	2013-2016

Kelly Bradford

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University of North Carolina at Greensboro
1300 Spring Garden St, Greensboro, NC 27412

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Education

Ph.D. Cultural Foundations of Education, University of North Carolina at Greensboro, expected Spring 2027
M.S.A. School Administration, Appalachian State University, Summer 2023
B.M.E. Music Education, University of North Carolina at Greensboro, Spring 2006

Honors & Awards

Taylor & Francis Past President's Award for Outstanding Graduate Student Paper 2025
Helena G. Houston Scholarship, University of North Carolina at Greensboro, 2023-2026
Jerome H Melton Endowment for Teaching and School Administration, Appalachian State University, 2022
Mary Jane Kistler Memorial Scholarship in College of Education Endowment, Appalachian State University, 2022

Research

Publications Selected

Lewis-Durham, T., Bradford, K., Hernandez, P., & Clarida, B. (2025, April). Stepping forward on shaky ground: developing equity-centered principals in politically complex settings. In *Frontiers in Education* (Vol. 10, p. 1521049). Frontiers Media SA.

Conference Paper Presentations Selected

Bradford, K. Dystopian Child Heroes in School Safety Messages., Arizona State University's BRIDGS Initiative: Bringing Research and Innovation into the Debate on Guns in Society. Phoenix, Arizona. February 27, 2026.

Lewis-Durham, T., Clarida, B., Osworth, D., & Bradford, K. Developing Equity Centered Leaders: Experiences of Assistant Principals in a Year-long Academy. University Council for Educational Administration, San Juan, Puerto Rico, November 2025

Gilded Age. Golden Age. Conservative Christian Women's Groups Influencing Public Education. American Educational Studies Association Annual Conference, Albuquerque, NM, November 2025.

Bradford, K. & Pegram, K. "Resisting "Radical Indoctrination": A Critical Discourse Analysis of Executive Education Policy." American Educational Studies Association Annual Conference, Albuquerque, NM, November 2025.

"The (Un)Separation of Church and State: The Rise of Christian Nationalism in Education," American Educational Studies Association Annual Conference, Hyatt Greenville, Greenville SC, November 2024.

Research Experience

Graduate Research Assistant, UNCG Department of Education Leadership and Cultural Foundations, 2023 – Present

Assisting Dr. Tiffanie Lewis-Durham on the research project: Principal Preparation, Wallace Grant, 2023 – Present

Presentations

Oliver, S., Bradford, K., Barkley, K., Jordan, O., Wimbish, A., Rumley, M., & Kelly, C. Reflective Dialogue and Inquiry as Praxis: Catalyzing Transformational Change in Rural Schools, Districts and Communities. Brock's Critical Conversations, Greensboro, NC. March 21, 2026.

Pegram, K. & Bradford, K. Critical Discourse Analysis with Teachers: Partnerships to Uncover the Unseen. Workshop Session. NCARES. Greensboro, North Carolina. February 2026

Lewis-Durham, T. & Bradford, K. "Mapping Educational Assets," ELC Critical Conversations Conference. March 2024, UNC Greensboro, Greensboro, North Carolina.

"STEAM Strategies for Gifted and Advanced Learners," NC Council for Exceptional Children Fall Exceptional Learner Summit. Virtual Event, October 2022.

"Media Makerspace: Where Content and Creativity Come Together, Motivated: NCTIES Conference. Virtual Event, March 2021.

Professional Development Sessions For Charter Schools Include: Leveraging Desmos in classrooms, Implementing the Engineering Design Process and Hands On Math as a Daily Practice

Teaching Experience

Graduate Teaching Assistant, UNCG Department of Education Leadership and Cultural Foundations, 2024 – Present

Cultural Foundations of Education, ELC 281: Fall 2024, Spring 2025, Fall 2025, Spring 2026

STEAM Teacher, and principal intern Envision Science Academy, 2018-2023

Service

School of Education Awards Committee Member 2023-24

AESA Member 2022-Present

UCEA Member 2025-Present

Critical Conversations Conference planning committee 2023-2024

NC Advancing Charter Collaboration and Excellence for Student Success Fellowship for Purposeful Leadership, NCDPI, 2022-2023

Lily Moms Coordinator, 2016-2018 & 2026-2027



RACHAEL SHAW MARSHALL

MONTESSORI LEADER · PROGRAM FOUNDER · CURRICULUM & SYSTEMS DEVELOPER

MAGGIE VALLEY, NC · RACHAELSHAWMARSHALL@GMAIL.COM · (770) 865-4344 ·
[LINKEDIN.COM/IN/RACHAELSHAWMARSHALL](https://www.linkedin.com/in/rachaelshawmarshall)

Montessori Head of School with experience leading public and independent programs through growth, transition, and systems development. Known for strong board partnership, fiscal stewardship, and building coherent organizational structures that sustain mission, people, and community over time.

PROFESSIONAL EXPERIENCE

Head of School, Curriculum Director

Mountain City Public Montessori - Asheville, NC (2023-2025)

Partnered with the Board and Operations Director to co-lead a public Montessori charter school serving children ages 3-14, providing CEO-level Head of School leadership across governance, operations, and academic programming. Co-managed a \$2M budget with a focus on fiscal stewardship, long-term sustainability, and mission alignment while maintaining fidelity to Montessori pedagogy and North Carolina state standards. Led the development and launch of the school's academic and operational foundations, co-creating systems for curriculum alignment, professional growth, and family engagement. Strengthened board-administration partnership through transparent reporting, strategic planning, policy development, and role clarity aligned with CEO-level Head of School leadership, fostering organizational coherence and shared leadership among staff, families, and governing bodies.

Designed and implemented school-wide systems for appraisal and coaching, a comprehensive professional development calendar, and MTSS structures integrating IEP and 504 compliance across programs. Led equity-focused initiatives including staff dialogue, curriculum review, and inclusive family engagement practices. Cultivated a strong founding culture of grace, courtesy, and joyful community life through intentional communication and school-wide events that built belonging and trust. Brought experience with processes parallel to Montessori accreditation, including AMI/AMS-aligned standards, compliance expectations, and program development, laying the groundwork for sustainable growth and accreditation readiness.

Founding Director of Adolescent Program and Adolescent Guide

Saint Clare's Tahoe: A Mountain Montessori School Incline Village, NV (2021- 2023)

Founded and led the design and launch of the school's first Montessori Adolescent Program, serving grades 7-8. Oversaw all aspects of program creation—including stakeholder communication, facility identification and adaptation, hiring, and curriculum development—ensuring alignment with Montessori philosophy and state expectations. Developed interdisciplinary humanities and micro-economy curricula, coordinated service learning and experiential projects, and guided students in leadership and community contribution. Collaborated with the Head of School to establish program policies, admissions materials, and professional development for adolescent staff.



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PROFESSIONAL EXPERIENCE CONTINUED

Founding Director of Primary Program and Primary Guide

Saint Clare's Tahoe: A Mountain Montessori School Tahoe Vista, CA (2018- 2021)

Designed and implemented the school's inaugural Primary program, creating a prepared environment that supported independence, concentration, and joyful learning. Developed scope and sequence, lesson materials, and parent education systems that modeled Montessori philosophy for families new to the approach. Built the foundation for the school's future growth through curriculum design, staff mentoring, and community partnerships. In addition to classroom responsibilities, directed school-wide events and dramatic productions that fostered confidence, collaboration, and expression among students.

Founding High School Residential Program Guide, Drama Guide

Hershey Montessori School Huntsburg, OH (2015- 2017)

Supported the development of Hershey's new High School Residential Program by adapting systems and structures from the middle school model to meet the evolving needs of older adolescents. Collaborated on designing routines, community expectations, and learning environments that fostered independence, accountability, and belonging within a residential setting. Gathered materials and developed frameworks that supported both academic and personal growth in alignment with Montessori principles. Directed multiple theatrical productions—including *The Role of the Soldier*—that integrated humanities studies with performance, connecting students to themes of history, empathy, and community storytelling.

Middle School Residential Guide, Humanities Guide, Drama and Music Guide

Hershey Montessori School Huntsburg, OH (2012- 2015)

Guided adolescents in both academic and residential life within Hershey's farm-based boarding community, integrating Montessori's principles of independence, stewardship, and work. Designed and taught humanities, drama, and music curricula that connected students to culture and purpose. Supported the implementation of the residential program's daily operations, community governance structures, and micro-economy projects. Collaborated across departments to align academic and residential learning as part of the school's AMI Adolescent model.



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PROFESSIONAL EXPERIENCE CONTINUED

Course Assistant, Residential Pedagogy Advisor

AMI Montessori Orientation to Adolescent Studies (2013- 2017)

Assisted the Course Director in designing and facilitating AMI's Orientation to Adolescent Studies program. Supported adult learners in applying Montessori principles to residential adolescent environments through workshops, observations, and community-building activities. Advised participants on integrating physical expression, humanities, and practical life experiences into adolescent programs.

Adolescent Guide, Drama and Music Guide, Elementary Assistant

Carolyn Barron Montessori School Newnan, GA (2004-2012)

Guided upper elementary and adolescent students in humanities, music, and performing arts, integrating creative expression with Montessori principles of independence and collaboration. Supported classroom management, lesson design, and community performances. Served as a bridge between elementary and adolescent levels, reinforcing continuity and developmental coherence.

EDUCATION AND CREDENTIALS

Loyola University Maryland – M.Ed. in Montessori Education

AMI (Association Montessori Internationale) – Adolescent and Primary Diplomas

Album Reader, Montessori Institute of San Diego (AMI Primary Program)

Louisiana Tech University – M.A. in Theatre

Wesleyan College – B.A. in Music

	Year 1	Year 2	Year 3	Year 4
Administrative & Support Personnel				
Lead Administrator/ Executive Director	1	1	1	1
Principal	0	0	0	1
Assistant Administrator/AP	0	1	1	1
Finance Officer	0	0	0	0
Clerical	1	1	1	1
Custodians	0	0	0	0
Total Admin and Support:	2	3	3	4
Instructional Personnel				
Core Content Teacher(s)	6	11	14	18
Electives/Specialty Teacher(s)	0	0	0	0
Exceptional Children Teacher(s)	1	2	2	2
Montessori Instructional Support Coaches	0	0	1	1
Teacher Assistants	6	11	14	18
Total Instructional Personnel:	13	24	31	39

Year 5

1
1
0
2
1
5

23
2
4
1
18
48

Enrollment Projections Year 1 through Year 5

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

If applying as 'Statewide Virtual', select 1000-Statewide Avg as LEA 1 only. If applying as 'Regional Virtual', select a maximum of 3 LEAs. The numbers in the following tables are projections, or estimates, and do not bind the State to fund the school at any part

LEA #1:	920-Wake	What percentage of students from
LEA #2:		What percentage of students from
LEA #3:		What percentage of students from

Grade	Year 1			Year 2			
	LEA #1	LEA #2	LEA #3	LEA #1	LEA #2	LEA #3	LEA #1
	920			920			920
Kindergarten	72			96			96
Grade 1	72			72			96
Grade 2				72			72
Grade 3							72
Grade 4							
Grade 5							
Grade 6							
Grade 7							
Grade 8							
Grade 9							
Grade 10							
Grade 11							
Grade 12							
LEA Totals:	144	0	0	240	0	0	336

For the first two years the State will fund the school up to the maximum projected enrollment for each of those years as shown. In subsequent years, the school may increase its enrollment only as permitted by NCGS 115C-218.7(b).



ects to enroll. In addition,
ose on the initial cover page.

imum of three LEAs.
icular level.

the LEA selected above will qualify for EC funding?	12.00%
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the LEA selected above will qualify for EC funding?	
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the LEA selected above will qualify for EC funding?	
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Year 3			Year 4			Year 5	
LEA #2	LEA #3	LEA #1	LEA #2	LEA #3	LEA #1	LEA #2	LEA #3
		920			920		
		96			96		
		96			96		
		96			96		
		72			96		
		72			72		
					72		
0	0	432	0	0	528	0	0

et forth and approved in the projected enrollment tables. However, in

Budget: Revenue Projections from each LEA Year 1

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.

State EC Funds: Charter schools receive a per pupil share of state funds per student with disabilities (school-aged 5 through 21). Funds are limited to 12.75% of the local education agency's average daily membership (ADM).

Federal EC 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:		920-Wake		
Revenue	Approximate Per Pupil Funding	Projected LEA ADM	Approximate funding for Year 1	
State Funds	\$6,500.00	144	\$936,000.00	
Local Funds	\$2,400.00	144	\$345,600.00	
State EC Funds	\$5,200.00	17	\$88,400.00	
Federal EC Funds				
			Total:	\$1,370,000.00

LEA #2:				
Revenue	Approximate Per Pupil Funding	Projected LEA ADM	Approximate funding for Year 1	
State Funds				
Local Funds				
State EC Funds				
Federal EC Funds				
			Total:	\$0.00

LEA #3:				
Revenue	Approximate Per Pupil Funding	Projected LEA ADM	Approximate funding for Year 1	
State Funds				
Local Funds				
State EC Funds				
Federal EC Funds				
			Total:	\$0.00

Personnel Budget: Expenditure Projections

Budget Expenditure Projections	Year 1			Year 2			Year 3		
	Number of	Average Salary	Total Salary	Number of	Average Salary	Total Salary	Number of	Average Salary	Total Salary
Administrative & Support Personnel									
Lead Administrator / Executive Director	1	\$ 95,000	\$ 95,000	1	\$ 100,000	\$ 100,000	1	\$ 105,000	\$ 105,000
Principal		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Assistant Administrator/AP		\$ -	\$ -	1	\$ 75,000	\$ 75,000	1	\$ 80,000	\$ 80,000
Finance Officer		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Clerical/Front Office	1	\$ 40,000	\$ 40,000	1	\$ 40,800	\$ 40,800	1	\$ 41,616	\$ 41,616
Food Service Staff		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Custodians		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Guidance /Social Worker		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Registrar		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
IT		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Nurse		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Total Admin and Support:	2		\$ 135,000	3		\$ 215,800	3		\$ 226,616
Instructional Personnel									
Core Content Teacher(s)	6	\$ 52,000	\$ 312,000	11	\$ 53,040	\$ 583,440	14	\$ 54,101	\$ 757,411
Electives/Specialty Teacher(s) - Year 4 & 5 2 Full time, 1 part time		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Exceptional Children Teacher(s)	1	\$ 55,000	\$ 55,000	2	\$ 56,100	\$ 112,200	2	\$ 57,222	\$ 114,444
Montessori Instructional Support Coaches		\$ -	\$ -		\$ -	\$ -	1	\$ 60,000	\$ 60,000
Teacher Assistants - Part Time Year 1	6	\$ 28,000	\$ 168,000	11	\$ 33,000	\$ 363,000	14	\$ 33,660	\$ 471,240
Grade Level Lead Stipends		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
*** Edit text as needed. ***		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
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Total Instructional Personnel:	13		\$ 535,000	24		\$ 1,058,640	31		\$ 1,403,095
Total Admin, Support and Instructional Personnel:	15		\$ 670,000	27		\$ 1,274,440	34		\$ 1,629,711

Benefits	Year 1			Year 2			Year 3		
	Number of	Cost Per	Total	Number of	Cost Per	Total	Number of	Cost Per	Total
Administrative & Support Benefits									
Health Insurance - 10% Increase a year	2	\$ 9,500	\$ 19,000	3	\$ 10,450	\$ 31,350	3	\$ 11,495	\$ 34,485
Retirement Plan--NC State		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Retirement Plan--Other - 3% Match	2	\$ 2,025	\$ 4,050	3	\$ 2,158	\$ 6,474	3	\$ 2,266	\$ 6,798
Life Insurance		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Disability		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Medicare	2	\$ 979	\$ 1,958	3	\$ 1,043	\$ 3,129	3	\$ 1,095	\$ 3,285
Social Security	2	\$ 4,185	\$ 8,370	3	\$ 4,460	\$ 13,380	3	\$ 4,684	\$ 14,052
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Total Admin and Support Benefits:				\$	33,378					\$	54,333					\$	58,620
Instructional Personnel Benefits																	
Health Insurance - 10% Increase a year	7	\$	9,500	\$	66,500	24	\$	10,450	\$	250,800	31	\$	11,495	\$	356,345		
Retirement Plan--NC State				\$	-				\$	-				\$	-		
Retirement Plan--Other - 3% Match	7	\$	1,573	\$	11,011	24	\$	1,323	\$	31,752	31	\$	1,358	\$	42,098		
Social Security-6.2%	13	\$	2,551	\$	33,163	24	\$	2,735	\$	65,640	31	\$	2,806	\$	86,986		
Disability				\$	-				\$	-				\$	-		
Medicare-1.45%	13	\$	597	\$	7,761	24	\$	640	\$	15,360	31	\$	656	\$	20,336		
Life Insurance				\$	-				\$	-				\$	-		
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Total Instructional Personnel Benefits:				\$	118,435					\$	363,552					\$	505,765
Total Personnel Benefits:				\$	151,813					\$	417,885					\$	564,385
Total Admin & Support Personnel (Salary & Benefits):		2		\$	168,378	3		\$	270,133	3		\$	285,236				
Total Instructional Personnel (Salary & Benefits):		13		\$	653,435	24		\$	1,422,192	31		\$	1,908,860				
TOTAL PERSONNEL:		15		\$	821,813	27		\$	1,692,325	34		\$	2,194,096				

*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.

Year 4			Year 5		
Number of	Average Salary	Total Salary	Number of	Average Salary	Total Salary
1	\$ 110,000	\$ 110,000	1	\$ 115,000	\$ 115,000
1	\$ 95,000	\$ 95,000	1	\$ 98,000	\$ 98,000
1	\$ 81,600	\$ 81,600	1	\$ 83,232	\$ 83,232
		\$ -			\$ -
1	\$ 42,448	\$ 42,448	2	\$ 43,297	\$ 86,595
		\$ -			\$ -
	\$ -	\$ -		\$ -	\$ -
	\$ -	\$ -		\$ -	\$ -
		\$ -			\$ -
		\$ -			\$ -
		\$ -		\$ -	\$ -
		\$ -			\$ -
		\$ -			\$ -
4		\$ 329,048	5		\$ 382,827
18	\$ 55,183	\$ 993,291	23	\$ 56,286	\$ 1,294,589
		\$ -	2	\$ 42,000	\$ 84,000
2	\$ 58,366	\$ 116,733	4	\$ 59,534	\$ 238,135
1	\$ 61,200	\$ 61,200	1	\$ 62,424	\$ 62,424
18	\$ 34,333	\$ 617,998	18	\$ 35,020	\$ 630,358
		\$ -			\$ -
		\$ -			\$ -
		\$ -			\$ -
		\$ -			\$ -
		\$ -			\$ -
39		\$ 1,789,221	48		\$ 2,309,505
43		\$ 2,118,269.49	53		\$ 2,692,332

Year 4			Year 5		
Number of	Cost Per	Total	Number of	Cost Per	Total
4	\$ 12,645	\$ 50,578	5	\$ 13,909	\$ 69,545
		\$ -			\$ -
4	\$ 2,468	\$ 9,872	5	\$ 2,297	\$ 11,485
		\$ -			\$ -
		\$ -			\$ -
4	\$ 1,193	\$ 4,772	5	\$ 1,110	\$ 5,550
4	\$ 5,100	\$ 20,400	5	\$ 4,747	\$ 23,735
		\$ -			\$ -
		\$ -			\$ -
		\$ -			\$ -
		\$ -			\$ -
		\$ -			\$ -

\$	85,622	\$	110,315
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39	\$ 12,645	\$ 493,136	48	\$ 13,909	\$ 667,630
		\$ -			\$ -
39	\$ 1,376	\$ 53,664	48	\$ 1,443	\$ 69,264
39	\$ 2,864	\$ 111,696	48	\$ 2,983	\$ 143,184
		\$ -			\$ -
39	\$ 670	\$ 26,130	48	\$ 698	\$ 33,504
		\$ -			\$ -
		\$ -			\$ -
		\$ -			\$ -
		\$ -			\$ -
		\$ -			\$ -
		\$ -			\$ -
		\$ -			\$ -
		\$ 684,626			\$ 913,582
	\$ 770,248			\$ 1,023,896	

4		\$ 414,670.32	5		\$ 493,141
39		\$ 2,473,847	48		\$ 3,223,087
43		\$ 2,888,517	53		\$ 3,716,228

Total Budget: Revenue Projections Year 1 through Year 5

All per pupil amounts are from the most current information and would be approximations for Year 1.

Federal funding is based upon the number of students enrolled who qualify. The applicant should use caution when relying on federal funding in year one to meet budgetary goals.

These revenue projection figures do NOT guarantee the charter school would receive this amount of funding in Year 1.

For local funding amounts, applicants may need to contact their local offices or LEA.

Income:	Year 1	Year 2	Year 3	Year 4	Year 5
State ADM Funds	\$ 936,000	\$ 1,560,000	\$ 2,184,000	\$ 2,808,000	\$ 3,432,000
Local Per Pupil Funds	\$ 345,600	\$ 576,000	\$ 806,400	\$ 1,036,800	\$ 1,267,200
State EC Funds	\$ 88,400	\$ 149,760	\$ 209,664	\$ 269,568	\$ 329,472
Federal EC Funds	-	-	-	-	-
Other Funds*					
Working Capital*					
TOTAL REVENUE:	\$ 1,370,000	\$ 2,285,760	\$ 3,200,064	\$ 4,114,368	\$ 5,028,672

*All budgets should balance indicating strong budgetary skills. Any negative fund balances will, more than likely, generate additional questions by those evaluating the application. 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 M.

Operations Budget: Expenditure Projections

The following list of expenditure items is presented as an example. Applicants should modify to meet their needs.

OPERATIONS BUDGET: Administrative and Support		Year 1	Year 2	Year 3	Year 4	Year 5
Office						
Office Supplies	\$	5,000.00	2,500.00	2,500.00	2,500.00	2,500.00
Paper/Copies	\$	5,000.00	3,500.00	4,000.00	4,000.00	5,000.00
Computers & Software	\$	12,000.00	10,000.00	10,000.00	10,000.00	12,000.00
Communications & Telephone	\$	2,500.00	2,500.00	3,000.00	3,000.00	4,000.00
Copier leases	\$	-	15,000.00	20,000.00	20,000.00	20,000.00
*** Insert rows and edit text as needed. ***						
Management Company						
Contract Fees						
Other						
*** Insert rows and edit text as needed. ***						
Professional Contract						
Legal Counsel	\$	3,000.00	3,000.00	3,000.00	3,000.00	3,000.00
Student Accounting	\$	11,000.00	20,000.00	25,000.00	30,000.00	35,000.00
Financial	\$	20,000.00	30,000.00	40,000.00	45,000.00	50,000.00
Professional Development/Training	\$	30,000.00	30,000.00	40,000.00	50,000.00	75,000.00
*** Insert rows and edit text as needed. ***						
Facilities						
Facility Lease/Mortgage	\$	175,000.00	190,000.00	400,000.00	500,000.00	550,000.00
Maintenance	\$	20,000.00	20,000.00	40,000.00	50,000.00	60,000.00
Custodial Supplies	\$	5,000.00	5,000.00	10,000.00	10,000.00	10,000.00
Custodial Contract	\$	15,000.00	15,000.00	30,000.00	40,000.00	40,000.00
Insurance (pg19)	\$	15,000.00	15,000.00	30,000.00	32,500.00	35,000.00
Playspace						
*** Insert rows and edit text as needed. ***						
Utilities						
Electric	\$	15,000.00	18,000.00	40,000.00	45,000.00	45,000.00
Gas	\$	4,000.00	5,000.00	10,000.00	13,000.00	15,000.00
Water/Sewer	\$	4,000.00	5,000.00	10,000.00	10,000.00	10,000.00
Trash	\$	4,000.00	4,000.00	5,000.00	5,500.00	5,500.00
Internet	\$	3,000.00	4,000.00	8,000.00	8,000.00	8,000.00
Phone	\$	2,000.00	2,000.00	2,500.00	2,500.00	3,000.00
Transportation						
Buses	\$	-	-	-	-	-
Gas	\$	-	-	-	-	-
Oil/Tires & Maintenance	\$	-	-	-	-	-
Other	\$	-	-	-	-	-
*** Insert rows and edit text as needed. ***	\$	-	-	-	-	-
Other						
Marketing/Community Engagement	\$	15,000.00	15,000.00	30,000.00	35,000.00	35,000.00
Child nutrition						
Travel						
Association & Professional Dues	\$	5,000.00	5,000.00	10,000.00	12,000.00	12,000.00
BOD Expenses	\$	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00
Total Administrative & Support Operations:	\$	371,500.00	420,500.00	774,000.00	932,000.00	1,036,000.00

OPERATIONS BUDGET: Instructional		Year 1	Year 2	Year 3	Year 4	Year 5
Classroom Technology						
Classroom/Student Devices	\$	15,000.00	10,000.00	10,000.00	10,000.00	10,000.00
Software (LMS, SIS, etc.)	\$	12,000.00	16,000.00	19,500.00	23,000.00	27,000.00
Wifi Access (Remote Applicants ONLY)						
Other	\$	-	-	-	-	-

Instructional Contract					
Staff Development					
EC/Psych/PT/OT Services	\$ 25,000.00	\$ 35,000.00	\$ 45,000.00	\$ 55,000.00	\$ 75,000.00
*** Insert rows and edit text as needed. ***					
Books and Supplies					
Instructional Materials	\$ 70,000.00	\$ 40,000.00	\$ 45,000.00	\$ 50,000.00	\$ 55,000.00
Curriculum/Texts	\$ 2,500.00	\$ 2,500.00	\$ 3,000.00	\$ 3,000.00	\$ 3,500.00
Testing Supplies	\$ -	\$ -	\$ 5,000.00	\$ 6,000.00	\$ 7,000.00
*** Insert rows and edit text as needed. ***					
Total Instructional Operations:	\$ 124,500.00	\$ 103,500.00	\$ 127,500.00	\$ 147,000.00	\$ 177,500.00
TOTAL OPERATIONS:	\$ 496,000.00	\$ 524,000.00	\$ 901,500.00	\$ 1,079,000.00	\$ 1,213,500.00

**Applicants may amend this table and the position titles to fit their Education and Operations Plans.*

Overall Budget

SUMMARY	Logic	Year 1	Year 2	Year 3	Year 4	Year 5
Total Personnel	J	\$ 821,813.00	\$ 1,692,325.00	\$ 2,194,096.20	\$ 2,888,516.99	\$ 3,716,228.41
Total Operations	M	\$ 496,000.00	\$ 524,000.00	\$ 901,500.00	\$ 1,079,000.00	\$ 1,213,500.00
Total Expenditures	N = J + M	\$ 1,317,813.00	\$ 2,216,325.00	\$ 3,095,596.20	\$ 3,967,516.99	\$ 4,929,728.41
Total Revenue	Z	\$ 1,370,000.00	\$ 2,285,760.00	\$ 3,200,064.00	\$ 4,114,368.00	\$ 5,028,672.00
Surplus / (Deficit)	= Z - N	\$ 52,187.00	\$ 69,435.00	\$ 104,467.80	\$ 146,851.01	\$ 98,943.59

Insurance Estimate for Encompass Montessori

Here's how we suggest you complete the online insurance section of the charter application:

Civil Liability and Insurance

Area of proposed coverage	Proposed amount of coverage		Cost (Quote)
*Comprehensive General Liability	\$1,000,000		\$1,265
*Officers and Directors/Errors and Omissions	\$1,000,000		\$3,057
*Property Insurance	\$100,000		\$500
*Motor Vehicle Liability	\$1,000,000		\$300
*Bonding Minimum/Maximum	\$250,000	\$250,000	\$332
*Other	\$1,000,000		\$6,811
Total Cost			\$12,265

*Include the "Insurance People" Word document as Appendix P of the application to demonstrate the levels of insurance coverage and projected cost.

Thank you for the opportunity to help start another charter school in N.C.

*Steve Griffin
Insurance People
1920 Front Street, Suite 750
P.O. Box 3006
Durham, NC 27715-3006*

800-825-0442 (Main)

steve@inspeople.com

INSURANCE PEOPLE

Below are the estimated annual premiums: **Encompass Montessori**

Property Premium Estimate **\$500**

Contents	\$50,000
Deductible	\$2,500
Form	Special
Equipment Breakdown Included	

General Liability Premium Estimate **\$1,265**

Rating Basis:	Students	144
	Faculty	15

Limits:

Per Occurrence Limit	\$1,000,000
Annual Aggregate	\$3,000,000
Sexual Abuse & Molestation	\$1,000,000 per occurrence \$3,000,000 aggregate
Employee Benefits	\$1,000,000 per occurrence \$3,000,000 aggregate

School District & Educators Legal Liability (D&O/ E&O)

Premium Estimate **\$3,057**

	\$1,000,000 per occurrence \$2,000,000 aggregate
Additional Defense	\$100,000/\$50,000/\$100,000

Named insured includes the insured Organization (School Entity), it's school board, School Committee, Board of Trustees, Board of Governors or similar governing body, elected or appointed members of the Board of Education, Board of Trustees, School Directors, School Committee, Board of Governors or similar governing board, Employees, Student Teachers, School Volunteers, and students while serving in a supervised internship program sponsored by the "educational institution".

Wrongful Act to include any actual or alleged act, error, omission, misstatement, misleading statement, neglect, or breach of duty by or on behalf of the Insured Organization, including educational malpractice or failure to educate, negligent instruction, failure to supervise, inadequate or negligent academic guidance of counseling, improper or inappropriate academic placement or discipline.

INSURANCE PEOPLE

Fidelity Bond Estimate	\$332
Limit \$250,000	
Auto Premium Estimate	\$300
Hired & Non-owned Auto Liability	
Limit of Liability \$1,000,000	
Head of Class Endorsement	\$82
Workers Compensation Premium Estimate	\$4,342
Statutory State - NC	
Employers Liability \$500/ \$500/ \$500	
Payroll Estimate \$1,164,000	
Umbrella Premium Estimate	\$2,387
Limit of Liability \$1,000,000	
TOTAL ESTIMATED PREMIUM	\$12,265
 Student Accident Coverage	 \$7.00/ student

These premiums are subject to change based on Underwriter review and approval of completed applications.

Disclaimer: The abbreviated outlines of coverages used throughout this proposal are not intended to express legal opinion as to the nature of coverage. They are only visuals to a basic understanding of coverages. The policy terms, conditions, and exclusions will prevail. Please read the policy forms for specific details of coverage

04/25/2025



Signature Page

The foregoing application is submitted on behalf of the Board of Directors of Encompass Montessori Charter School. 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 "Planning Year for New and Preliminary Charter Schools – CHTR 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: Katherine Brown

Board Position: President

Signature: Katherine Brown

Date: 4-21-26

Sworn to and subscribed before me this 21st day of April, 2026.

Notary Public: Swati Subhadarshini

Official Seal:

My commission expires: Jan 06, 2031.

SWATI SUBHADARSHINI

Notary Public

Wake Co., North Carolina

My Commission Expires Jan. 06, 2031