Organization Information

Organization Name *
Encompass Montessori Charter School

Telephone
2562279253

Fax

Address
4030 Wake Forest Road

Unit/Suite
349

Zip Code
27609

City
Oak ridge

State
Tennessee

Primary Contact Name *
Candace Fletcher

Opening Year *
2027

Is Management Organization Used
(•) Yes ( ) No

Primary Contact Relation To Board *
Board President

Management Organization Name
Epic Change Education

Management Organization Contact Name
Sherilyn Moore

Primary Contact Email *
candace.fletcher@public-montessori.org

Management Organization Phone
3107045295

Primary Contact Phone *
2562279253

Management Organization Email
sherilyn.moore@gmail.com

PrimaryContact Address *
150 Hendrix Drive

Unit/Suite *

Zip Code *
37830

City *
Oak ridge

State *
Tennessee

Board Members Roster

Name	Street Address	Zip Code	Email	Expertise
Sara Suchman, PhD	51A Thayer Road	05301	sara.suchman@public-montessori.org	PhD, MBA, Montessori Nonprofit Executive Director
Stephen Griffin	1920 Front Street	27705	steve@inspeople.com	Insurance Professional
Carol Pirrello	555 Husketh Road	27596	cpirrello@live.com	Montessori Parent, Social Worker

Name	Street Address	Zip Code	Email	Expertise
Katie Brown, PhD	208 W Hill Drive	27519	katie.brown@public-montessori.org	Montessori Parent, Montessori Researcher

1. Application Contact Information

Q1. Name of Proposed Charter School

Encompass Montessori Charter School - Wake County

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

256-227-9253

Q3. Geographic County in which charter school will reside

Wake County

Q4. LEA/District Name

Wake County Public Schools

Q5. Zip code for the proposed school site, if known

N/A

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. Give 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 as reflected in the budget.

N/A

Q9. Provide a full detailed response of the assistance provided by the third-party consultant or group while preparing this application and when the assistance will end:

The National Center for Montessori in the Public Sector (NCMPS) supported the development of this charter application in full collaboration with the founding team and board of directors. NCMPS focused primarily on supporting Section 10: Educational Plan and this subsection draws heavily on the National Center for Montessori in the Public Sector (NCMPS) whole-school approach to Montessori. The National Center brings years of experience in public Montessori education and their model is the gold standard for public Montessori practice. As such, though this application and the design for Encompass is solely that of the Board, there may be similarities to other schools using the same model.

All support from NCMPS has been offered on a pro bono basis. This assistance will end with the submission of the application. NCMPS works with many charter schools and will be available as needed at the behest of the school.

Epic Change Education (ECE) provided guidance in the development of the charter application in collaboration with the founding team and board of directors. From the financial plan to the mission and vision, the entire team worked together to ensure alignment and accuracy.

ECE will remain as the CMO for Encompass Montessori, with a clear focus on supporting what is best for the students and what is best for the long-term financial stability of the school itself. ECE was designed to be a support organization to ensure the school succeeds and each student thrives and will continue to provide support from the business, operations, and/or educational aspects, particularly in the founding stages of the school. Once the school is open to students, the CMO will continue in the background to ensure the school leadership and board of directors have all the support they need to make the school successful.

Q10. Projected School Opening Month

August 2027

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).

☑ Upload Required **File Type:** excel **Max File Size:** 30 **Total Files Count:** 1

Resources

Enrollment Summar...

Applicant Evidence :

Q12. Enrollment Su...

Uploaded on **4/25/2025**
by **David Ayer**

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.

Q14. Complete the Enrollment Demographics table (see resources), providing projected enrollment for each of the following demographic groups.

☑ Upload Required **File Type:** excel **Max File Size:** 30 **Total Files Count:** 1

Resources

Enrollment Demogra...

Applicant Evidence :

Q14. Enrollment De...

Uploaded on **4/25/2025**
by **David Ayer**

Q15. Describe the rationale for the number of students and grade levels served in year one and the basis for the growth plan outlined above.

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 K and 1st in our first year and then adding a grade each year until we reach full enrollment with a complete K - 8 program. We are starting with 72 students in each of K and 1st to allow optimal Montessori class sizes of 24 students each, a realistic recruiting number, and a robust enough budget to safely see us through the years as Encompass grows. Going forward, K will be the primary entry year. In the second year, with a successful year and positive reputation, we will recruit an incoming class of 96 Ks and continue at that number in this entry year going forward.

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.

Q16. This subsection is entirely original and has not been copied, pasted, or otherwise reproduced from any other application.

- (●) I certify
- ( ) I do not certify

Q17. Explanation (optional)

Section

Jessica Kelly

Ratings

Meets the Standard	The response meets the criteria in some aspects, but lacks sufficient detail and/or requires additional information in one or more areas.

Comments :

The candidate clearly identifies primary contact and management organizations. There is a specified opening year, and the school type is clearly defined. The rationale for growth and the entry-year design is strong. There is some missing or vague information, such as the school zip code, which states "N/A." The candidate indicates that the consultative services of the management organizations did not have a financial expense tied to the services.

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.

Q18. Organization Type

- (●) Non-Profit Corporation
- ( ) Municipality

Q19. 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

Q20. Has the organization applied for 501(c)(3) non-profit status?

- (●) Yes
- ( ) No

Q21. The private non-profit listed as the responsible organization for the proposed charter school has 501(c)(3) status:

- Federal Tax-Exempt Status (NCGS 115C-218.15)
- If the non-profit organization has yet to obtain 501(c)(3) status, the tax-exempt status must be obtained from the Internal Revenue Service within twenty-four (24) months of the date the Charter Application is given final approval.

- ( ) Yes
- (●) No

Q22. Attach as Appendix F Federal Documentation of Tax-Exempt Status

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

Total Files Count: 10

Applicant Comments :

Tax exempt status has been applied for and should be granted in 2025.

Applicant Evidence :

Q22. Attach as Appe...

Uploaded on **5/21/2025**
by **Candace Fletcher**

Q23. 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

Q24. Federal Tax ID

We are awaiting a federal tax ID

Section

Jessica Kelly

Ratings

Meets the Standard	The response meets the criteria in some aspects, but lacks sufficient detail and/or requires additional information in one or more areas.

Comments :

The candidate identifies the nonprofit name and agent as well as states that the 501(c)(3) status has been applied for and should be granted in 2025. The federal tax ID is still pending, and the candidate could benefit from providing the updated documentation that the status has been approved.

3. Acceleration

Per NC Administrative Code 16 NCAC 06G .0509 (https://simbli.eboardsolutions.com/Policy/ViewPolicy.aspx?S=10399&revid=84R1LVelxY9lvhpKdhHt1w==&ptid=muNUlKiR2jsXcslsh28JpBkiw==&secid=x9VPtMUo9twbb6Q1kKyM7A==&PG=6&IRP=0), the State Board of Education, in its discretion, may accelerate the mandatory planning year to increase the number of high-quality charter schools.

Q26.**Requirements**

The State Board of Education may accelerate the mandatory planning year for a charter applicant that meets the following requirements:
(1) agrees to participate in the planning year while the charter application is being reviewed without any guarantee of charter award; and
(2) demonstrates that there is a facility identified by the applicant that is feasible for opening on an accelerated schedule. Do you want your application to be considered for acceleration?

- ○ Yes
- ◉ No

Section

Jessica Kelly

Ratings

Meets the Standard	The response meets the criteria in some aspects, but lacks sufficient detail and/or requires additional information in one or more areas.

Comments :

The applicant is not planning on acceleration.

4. Conversion

Q40. Is this application a Conversion from a traditional public school or private school?

- ○ Yes
- ◉ No

Section

Jessica Kelly

Ratings

Meets the Standard

The response meets the criteria in some aspects, but lacks sufficient detail and/or requires additional information in one or more areas.

Comments :

The candidate indicates no conversion.

5. Replication

Per NC Administrative Code 16 NCAC 06G .0512, the State Board of Education (SBE) may, in certain well-defined instances, grant permission for a non-profit 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 SBE may also, in certain well-defined instances, grant permission for a non-profit 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 foregoes the planning year required of new charter school applicants.

History Note: Authority G.S. 115C-218.3;

Emergency Adoption Eff. August 20, 2019;

Eff. March 17, 2021.

Q57. Do you want this application to be considered for standard or fast-track replication?

- ○ Standard
- ○ Fast-Track

- No, this is not a replication

Section

Jessica Kelly

Ratings

Meets the Standard	The response meets the criteria in some aspects, but lacks sufficient detail and/or requires additional information in one or more areas.

Comments :

The candidate indicates this is not a replication.

6. Alternative

*A charter school meeting the eligibility criteria set forth in this policy and seeking designation as an "alternative school" must submit an application to the Office of Charter Schools describing in detail the school's mission as it relates to the request for the designation; the criteria the school plans to use that will meet the eligibility requirements set forth below, including the documentation the school will use to support its admissions process; how the school intends to serve the select population, educationally and otherwise; and the goals the school is setting for academic achievement for this population. The application must also include an admission plan that is well-defined and specifically limited to serving at-risk students as described in the application. A plan that is not well-defined will not be approved.

*The school must, in its application, designate which of the alternative accountability options it is requesting under ACCT-038 (https://simbli.eboardsolutions.com/ePolicy/policy.aspx?PC=ACCT-038&Sch=10399&S=10399&C=ACCT&RevNo=1.02&T=A&Z=P&St=ADOPTED&PG=6&SN=true). The option selected, if approved, cannot be changed except at the time of renewal (as outlined in CHTR-020.III (https://simbli.eboardsolutions.com/ePolicy/policy.aspx?PC=CHTR-020&Sch=10399&S=10399&C=CHTR&RevNo=1.02&T=A&Z=P&St=ADOPTED&PG=6&SN=true)).

Q68. Do you want your application to be considered for an Alternative Charter School?

- ○ Yes
- ◉ No

Section

Jessica Kelly

Ratings

Meets the Standard	The response meets the criteria in some aspects, but lacks sufficient detail and/or requires additional information in one or more areas.

Comments :

The candidate indicates this is not an alternative school.

7. EMO/CMO

Q70. **Does the Charter School plan to contract for services with an "educational management organization" or "charter management organization?**

- (●) Yes
- ( ) No

Q71. **EMO/CMO Mailing Address City, State, Zip**

Epic Change Education, Inc.

9907 8th Street, Unit 873

Gotha, Florida 34734

Q72. **EMO/CMO Website**

Not Applicable

Q73. **Explain how the contract with the specified EMO or CMO will be in the best educational and financial interest of the charter school.**

According to the 2023 CREDO study*, charter schools who are part of a Charter Management Organization post even higher academic gains for their students in both reading and in math.

In North Carolina, CMO Charter Schools are on average posting the equivalent to 7 additional learning days in Reading and 37 days in Math. Clearly, the function of a CMO can elevate the outcomes for students.

Time is the most precious resource in any charter school administrator's day, and a CMO allows the Principal to spend the majority of their time on developing teachers, connecting with families and establishing partnerships with the local community, instead of paperwork or negotiating with vendors.

Effective CMO's not only handle the business of the charter school with excellence, but they also deeply understand the school's mission and model.

The specified CMO, ECE (which describes itself as a School Development and Support Organization to underscore its mission and role) works to support and elevate the school's own mission and model. It was founded by a previous public Montessori Prek-12 CEO with the express purpose to allow for innovation, engagement, and empowering schools to thrive.

By implementing a robust Montessori educational review process, including the A-Game standards of achievement (https://eadn-wc04-7585698.nxedge.io/cdn/wp-content/uploads/2024/10/NCMPS_Assessment_Guidelines_for_Authorizers.pdf (https://eadn-wc04-7585698.nxedge.io/cdn/wp-content/uploads/2024/10/NCMPS_Assessment_Guidelines_for_Authorizers.pdf)) above-and-beyond the authorizer's standards, ECE provides an additional layer of support and accountability for the students and families that their students are progressing with excellence.

NCMPS is the leading authority in effective Montessori education in the Public Sector. Creating a highly-effective school that can be a model example on how to effectively implement the Montessori model for academic, social and emotional, and 21st century skill goals is a shared outcome for both the Board of Directors and ECE. ECE

Financially, the fees for ECE are set at an affordable rate and less than what the school could pay in hiring on-ground staff and other for-profit vendors to execute the work. ECE works directly with non-profit organization Building Hope Services, a non-profit who has been ensuring schools remain compliant without audit findings and that back office operations run smoothly for twenty years. Risk Strategies Insurance will also be a key partner with ECE schools to create a group and lower insurance rates, which will also provide significant savings and security that coverage will be long-term.

*Raymond, Margaret, et.al. (2023) *As a Matter of Fact: The National Charter School Study II, 2023.* CREDO.

Applicant Evidence :

Screenshot 2025-04-...

Uploaded on **4/25/2025**
by **Candace Fletcher**

Q74. Attach as Appendix A4.1: Executed or Draft Management Contract

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

Total Files Count: 5

Applicant Evidence :

EM and ECE Manage...

Uploaded on **4/25/2025**
by **Candace Fletcher**

Q75. What other EMO/CMOs were pursued and why did the applicant select this one? Please include information regarding other management organizations' fees and financial/academic records that led to the selection of the proposed EMO/CMO as the best fit for this proposed school.

The CMO was founded by Sherilyn Moore, who was CEO of a private PreK and a public K-8 Montessori. She also founded Innovation Montessori High School. The schools continue to thrive because the board and administration were set up for success with strong fiscal management and a focus on serving the child. Prior to becoming CEO, as Board Chair, Moore instituted the ballast to which all decisions should be made: what is best for the students and what is best for the long-term viability of the school. This is the exact same decision tree that will be used in service as the CMO for Encompass Montessori.

Having an experienced Montessori Public Charter School CEO will ensure that the school is not only academically successful, but culturally responsive and fiscally sound. A unique model requires a deeper level of understanding, and how to make charter school economics work to best support the faculty, staff, and administration will help the partnership with the local school board as they set effective policies and procedures.

Creating and serving engaging, empowering and innovative PreK-12 schools and leaders to give students nationwide an opportunity to thrive is the Epic Change Education mission. The schools ECE will support are only schools who put the students first. ECE does not believe in, nor support, a “cookie-cutter” approach to school management or educational delivery. Every school and community is unique, and local school Principals and Boards must be provided with the flexibility and resources to continually adapt to best serve the needs of their community.

Other management organizations charge up to 18% for their services. ECE will charge 12-15%, with a discount in Years 1-3 if needed for the school to thrive.

Services will include:

- Payroll & HR Primary Services
- Retirement Plan Management
- Benefits & Benefits Administration
- Student Lottery System
- Grants Management
- Marketing
- Enrollment
- Back Office
- Audit Preparation
- Budget Advising and Support
- Educational Model Training
- Educational Model Review

Q76. Provide and discuss student performance, governance performance, and financial

data from other schools managed by the management company to demonstrate how this organization is a good fit for the targeted student population. Nationally, what are the highest and lowest-performing schools of the EMO/CMO? Why are these two schools so different in overall achievement?

This will be Epic Change Education's first CMO school, so the organization itself has no track record. The CEO of the school ran a successful, and still thriving, Montessori PreK, K-8, and high school in Florida that incurred zero audit findings and always held a fund balance at, or above 3%. The academics were a "B" grade under her care.

Q77. **Describe how the governance structure will be affected, if at all, by the EMO/CMO, and particularly discuss how the board of directors of the charter school will govern the school independently of the EMO/CMO.**

The governance structure of the school will not be affected by the CMO. The Board of Directors, with the Executive Director of the school, will be provided with a preliminary Annual Budget for each Fiscal Year, created with input from the Executive Director for the Charter School, on or before May 31st of the current Fiscal Year, as detailed in the Budget Process section 5.3 in the Draft Management agreement. After the Board of Directors approves the budget. Adjustments may be made semi-annually, or quarterly if needed.

The efficacy of the services will be evaluated annually, monthly meetings with the Executive Director and/or the Board of Directors, as set by North Carolina statute, will ensure transparency and efficiency.

Q78. **Provide a description of the relationship that will exist between the charter school employees and the Management Organization.**

Charter school employees will be employed and managed by the school. Staff and Faculty will report to the AP, Principal, and Executive Director. The Executive Director reports directly to the Board Chair. Administration and Staff will work together in partnership to maintain efficient and effective operations, and to best support the students with a strong Montessori educational model.

Q79. **Explain how the contract includes measurable objectives whereby the charter school board can evaluate annually the performance of the EMO/CMO, and if necessary, terminate the contract without significant obstacles.**

The draft contract (Appendix A.4.1) calls for an annual performance review around the following metrics:

Timely submission of required reports set forth in this Agreement;

Strict adherence to the approved Annual Budget for the operation and management of the Charter School, with no aggregate cost over runs

Performance goals contained within the Charter Agreement and the Charter Application in sections 9.3 and 10.4.

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
  - 90% 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
  - 90% 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
  - 90% of students score at grade level OR
  - meet a growth percentile of at least 45

The "A-Game" NCMPS assessment standards (NCMMPS Assessment Guidelines for Authorizers (https://eadn-wc04-7585698.nxedge.io/cdn/wp-content/uploads/2024/10/NCMPS_Assessment_Guidelines_for_Authorizers.pdf)) will be utilized by the CMO to self-assess and by the BOD to determine efficacy of the program.

Q80. Is the facility provided by the EMO/CMO?

- (●) Yes
- ( ) No

Q81. Attach as Appendix A4.2 Facility Buyout Agreement, if applicable

A Draft Lease LOI is provided to demonstrate the typical process of the school leasing, at a rate that fits within its budget, and to engage in the long-term lease until buyout. In this financial model, schools will have a true lease/purchase arrangement, where their lease payments serve to pay down the debt and their eventual purchase of the facility can be as little as $1,000.

Applicant Evidence :

Encompass Montess...

Uploaded on **4/23/2025**
by **Candace Fletcher**

Q82.**List the fund balance and surpluses for each school managed by the EMO/CMO over the last three years in North Carolina.**

N/A

Q83.**Attach Appendix A4.3: EMO/CMO Financial History** Provide as Appendix A4.3 the financial history and statements of the EMO/CMO over the last three years. Specifically, if contracting with an EMO, provide confirmation that the EMO is in good standing by providing bank statements from the prior three years.

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

Total Files Count: 6

Applicant Evidence :

Q83. Appendix A4.3_ ...

Uploaded on **5/21/2025**
by **Candace Fletcher**

Q84.**Attach Appendix A4.4: IRS Form 990** Provide as Appendix A4.4 the IRS Form 990 (or equivalent documents if the organization does not file a 990) for the prior three years

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

Applicant Evidence :

Q84. Attach Appendi...

Uploaded on **5/21/2025**
by **Candace Fletcher**

Section

Jessica Kelly

Ratings

Meets the Standard

The response meets the criteria in some aspects, but lacks sufficient detail and/or requires additional information in one or more areas.

Comments :

The candidate described the CMO (Epic Change Education) in detail. The applicant provided a letter of intent with Epic Change Education that outlines the goals, accountability measures, and termination clauses. Even with the documentation and description included, it is concerning that the CMO, Epic Change in Education, has not been active in three years; therefore, there is no current data to support the effectiveness of the CMO. Even though Epic Change in Education claims to have been a successful CMO this is relying heavily on the founder's past experiences.

8. 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.**

Q85.

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

- ○ Yes
- ◉ No

Section

Jessica Kelly

Ratings

Meets the Standard	The response meets the criteria in some aspects, but lacks sufficient detail and/or requires additional information in one or more areas.

Comments :

The candidate clearly states this is not a remote academy.

9. Mission Purposes, and Goals

9.1. 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.

Q112. **Please state the mission statement of the proposed charter school (35 words or less)**

- **The mission statement defines the organization's purpose and primary objectives, describing why it exists.**
- **The mission statement should indicate in measurable terms what the school intends to do, for whom, and to what degree.**

To provide Wake County 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.

Jessica Kelly

Comments :

The mission is clear and concise and focuses on the Montessori philosophy: community-centered leadership and inclusivity. The narrative on the mission did not define what "flourish" or "community-centered leaders" look like in measurable terms.

Q113. **Please state the vision statement of the proposed school.**

- **What will the school look like when it is achieving the mission?**
- **The vision statement outlines how the school will operate and what it will achieve in the long term.**

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 (https://www.dpi.nc.gov/about-dpi/state-board-education))

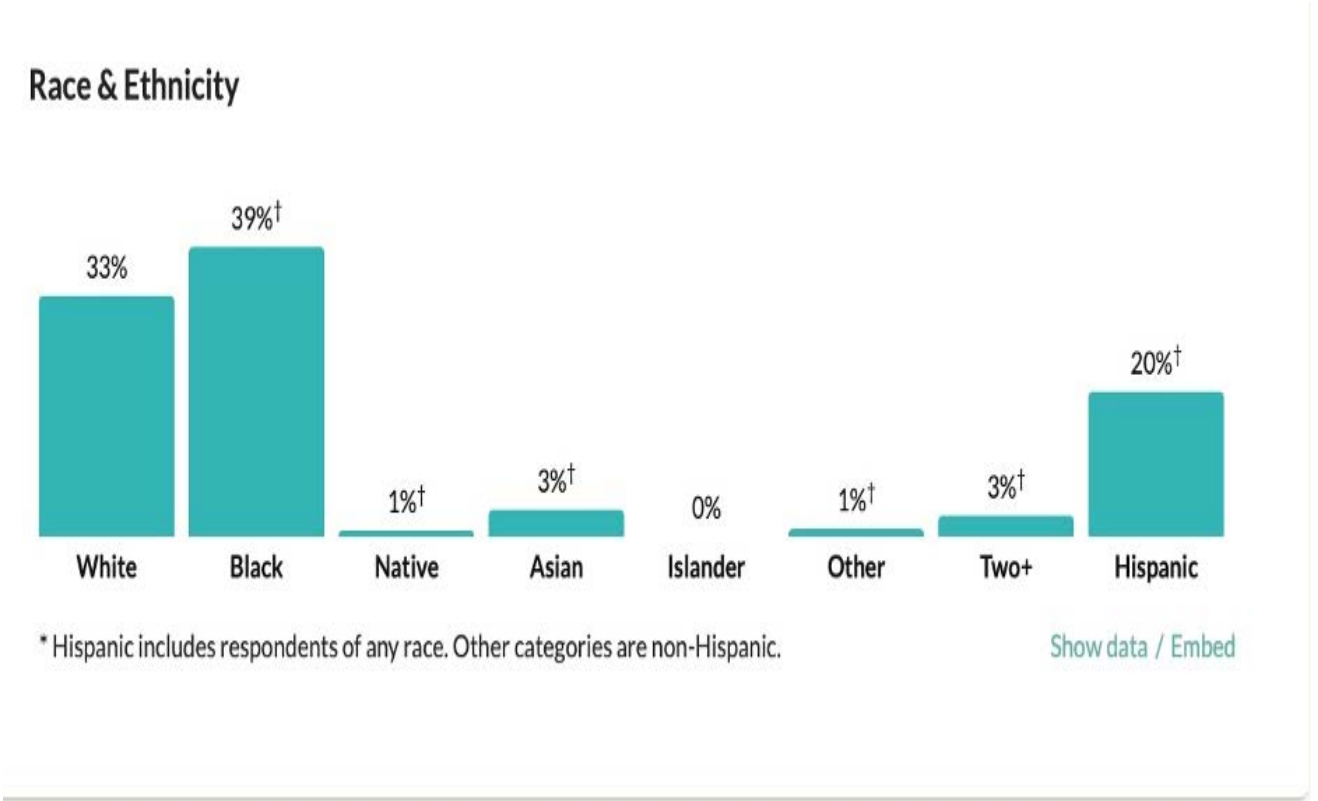
Jessica Kelly

Comments :

The vision includes a strong emphasis on equity, accessibility, and personalized learning. There is also alignment with the NC educational goals and how the state's vision is creating lifelong learners. While the vision is inspiring, it could benefit from more concrete operational descriptions, such as what success looks like in 1 year or 5 years.

Q114.**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 is the community immediately around the school's location in Knightdale, in eastern Wake County, including in particular the cities of Knightdale, Garner and Wendell, which collectively have the following demographics:



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 for the 2024–25 school year (Wake County Public School System. 2025. District Facts (https://www.wcpss.net/domain/100)), approximately 35% 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 MLL and SWD 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 MLL and SWD students.

Jessica Kelly

Comments :

The demographic analysis provides a strong response for the applicant by using local data (Census Reporter, WCPSS) to explain enrollment targets. There is a commitment to diversity with clear strategies to enroll multilingual learners, students with disabilities, and economically disadvantaged students. There is an inclusive outreach plan with specific tactics described, including plain-language communication, community partnerships, and Spanish-language materials. However, there may not be enough to guarantee equitable access without additional recruitment and retention safeguards due to the heavy reliance on lottery preference. The outreach plans could be strengthened with performance metrics or tracking mechanisms to assess success over time.

Q115. **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?**

Performance outcomes for Wake County Public Schools include:

1. End-of-Grade (EOG) Test Scores: These tests assess student proficiency in reading and math for grades 3-8.
2. School Performance Grades: Schools receive a letter grade (A-F) based on a combination of student achievement and growth metrics.
3. Proficiency Rates: The percentage of students meeting or exceeding grade-level expectations in core subjects

As evidence by the data below, the Wake County Public School enrollment trends can be summarized as follows :

1. Significant population growth.
2. Drastic increase in student populations
3. Increasingly diverse populations.

Per the Raleigh News & Observer, Wake County Public Schools has seen a gradual increase in its student population, noting that the district will gain an additional 1300+ children in the 25-26 school year. Enrollment had dropped during the pandemic and families were choosing alternative methods of education like charters and independent schools. 3500 students were reassigned last year and enrollment caps were implemented at 22 of the district's schools. 1176 students attended charter schools in Wake County last year and was higher than the district's growth. In Knightdale, itself, the Town of Knightdale boasts a growing list of educational options available for itself; noting that Wake County Public Schools serves this area.

Academic Performance Outcomes of surrounding schools:

By composite numbers, students in Wake County Public Schools outperformed their counterparts in the remaining school districts in North Carolina. In the schools that serve children in Knightdale, academic outcomes varied with scores of proficiency in math, reading and science falling below the Wake County Public Schools and North Carolina state averages.

Hillburn

	OUR SCHOOL	WCPSS AVERAGE	NC AVERAGE
2023-24 Performance Composite	64.1%	64.9%	54.6%
Reading Percent Proficient (Grades 3-8)	62.9%	61.6%	50.1%
Math Percent Proficient (Grades 3-8)	61.9%	64.9%	54.6%
Science Percent Proficient (Grades 5 & 8)	73.9%	74.6%	68.0%
Percent Reaching Reading Benchmarks (Grades K-2)	86.8%	77.3%	n/a
Percent of Kindergarten Students Read to Daily at Home	75.0%	54.5%	n/a
Percentage of Incoming 6th-Graders Proficient on Grade 5 Reading End-of-Grade test	51.7%	58.8%	n/a

Knightdale Elementary

	SCHOOL	AVERAGE	AVERAGE
2023-24 Performance Composite *	38.4%	64.4%	54.6%
Reading Percent Proficient *	37.4%	61.9%	50.1%
Math Percent Proficient *	34.6%	62.4%	54.6%
Science Percent Proficient (Grade 8)	53.2%	77.4%	70.0%
Percentage of incoming 6th-graders Proficient on grade 5 reading End-of-Grade test	35.3%	58.8%	n/a

Forestville Road Elementary

	OUR SCHOOL	WCPSS AVERAGE	NC AVERAGE
2023-24 Performance Composite *	36.3%	65.5%	54.6%
Reading Percent Proficient (Grades 3-5) *	35.9%	61.3%	50.1%
Math Percent Proficient (Grades 3-5) *	36.6%	67.5%	54.6%
Science Percent Proficient (Grade 5)	37.1%	71.7%	66.0%
Percent Reaching Reading Benchmarks (Grades K-2)	73.3%	77.3%	n/a
Percent of Kindergarten Students Read to Daily at Home	29.4%	54.5%	n/a

Hodge Road Elementary

	OUR SCHOOL	WCPSS AVERAGE	NC AVERAGE
2023-24 Performance Composite *	47.9%	65.5%	54.6%
Reading Percent Proficient (Grades 3-5) *	40.0%	61.3%	50.1%
Math Percent Proficient (Grades 3-5) *	49.8%	67.5%	54.6%
Science Percent Proficient (Grade 5)	65.2%	71.7%	66.0%
Percent Reaching Reading Benchmarks (Grades K-2)	68.9%	77.3%	n/a
Percent of Kindergarten Students Read to Daily at Home	30.5%	54.5%	n/a

Lockhart Elementary

	OUR SCHOOL	WCPSS AVERAGE	NC AVERAGE
2023-24 Performance Composite *	47.6%	65.5%	54.6%
Reading Percent Proficient (Grades 3-5) *	41.8%	61.3%	50.1%
Math Percent Proficient (Grades 3-5) *	50.2%	67.5%	54.6%
Science Percent Proficient (Grade 5)	58.6%	71.7%	66.0%
Percent Reaching Reading Benchmarks (Grades K-2)	61.6%	77.3%	n/a
Percent of Kindergarten Students Read to Daily at Home	31.0%	54.5%	n/a

Elements of the Montessori model will meet the needs of students in the target population by:

The Montessori model's focus on individual needs, hands-on learning, and a supportive environment 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.

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.

- 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.

- 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.

Jessica Kelly

Comments :

The applicant provides strong rationale using Wake County trends including growing population, overcrowded schools, and gaps in Montessori access. The Montessori model connects to local academic needs including hands-on, student-led, and inclusive. The explanation of key practices like mixed-age classrooms, extended work periods, and sensory-based instruction are strong. There is limited comparative data; the applicant mentions surrounding schools perform below average but lacks detailed metrics. There is also an assumption of familiarity with the Montessori model; further clarity on the Montessori pedagogy could strenthen the response.

Q116. **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' 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/domain/100))

Our Enrollment Chart from Inception to Full Enrollment spans from 2027-2037:

encompass montessori

ENROLLMENT PROJECTIONS **2027 - 2037**

School Year:		2027-2028	2028-2029	2029-2030	2030-2031	2031-2032	2032-2033	2033-2034	2034-2035	2035-2036	2036-2037
Total Students Enrolled:		144	240	336	432	528	552	624	744	840	864
Grade Level:	K	72	96	96	96	96	96	96	96	96	96
lower-el	1st	72	72	96	96	96	96	96	96	96	96
lower-el	2nd		72	72	96	96	96	96	96	96	96
lower-el	3rd			72	72	96	96	96	96	96	96
upper-el	4th				72	72	96	96	96	96	96
upper-el	5th					72	72	72	96	96	96
upper-el	6th							72	96	96	96
middle school	7th								72	96	96
middle school	8th									72	96

Jessica Kelly

Comments :

The applicant provided an enrollment summary; the first five years matches what was stated earlier in the application.

Q117.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 is designed to thoughtfully address persistent challenges in the Research Triangle region, 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.

Jessica Kelly

Comments :

The applicant explains the continuity of K-8 with reduced transitions and personlized pacing which differentiates from traditional schools. Barriers such as income inequality, school mobility, and cultural disconnects are targeted. There is a cohesive structure with multi-age grouping, consistent teacher relationships and developmental alignment. The vision of equity and personalization is strong, but specifics on how success will be monitored are less clear.

Q118. **Describe the relationships that have been established to generate support for the school. How have you assessed demand for the school? Briefly describe these activities**

and summarize their results

Encompass' leadership prioritizes relationships with children, families and local community partners. Without actively listening to expressed needs and concerns, there would be no reason for anyone to express support for a school, nor could we accurately assess demand. In order to gauge the community's demand and generate support, Encompass leadership engaged the community in these ways:

Establishment of Community-Based Social Media Presence, www.encompassmontessori.org (http://www.encompassmontessori.org/). Through this website, Encompass was able to request information from prospective families around two critical questions of whether or not the individual(s) were familiar with the Montessori method and whether or not they were interested in a free, publicly-funded Montessori K-8 school being created in this area. This website will continue to gauge interest before the school opens. With tweaks and updates, this website will be the vehicle by which Encompass can provide families updates on the school's progress and its initiatives.

Local Partnerships with educational and child-focused organizations to understand community needs. Entities who have expressed support for our work and the potential of this project coming to life have been more than gracious in sharing their impressions of the educational landscape in North Carolina. These organizations and individuals have shared their lessons learned, strategies they employed to found and operate their schools, as well as extended open invitations for meetings, question and answer sessions and email conversations. It is our intention to nurture these relationships and formalize partnership with these organizations during a planning year and throughout the lifetime of Encompass Montessori Charter School. Encompass is grateful for the opportunity to have had guidance from individuals at GreatSchools NC and the North Carolina Charter Schools Association.

Future plans for community engagement include:

Volunteer Initiatives and community service projects reflecting our school's values.

Feedback Mechanisms in the form of online surveys and suggestion boxes for continuous community input.

Open House Events at key development stages to show transparency and build community trust.

Create and Foster Community & Business Partnerships for sponsorships and educational experiences like field trips.

Formation of an advisory council providing the environment for advocates to gather and build community

Participate actively in local events to build bridges to the community while increasing school visibility.

Jessica Kelly

Comments :

The website and social media leveraged to gauge demand and track interest are evidences of the use of digital engagement tools. There are existing partnerships noted of connections with NC Charter Schools Association and GreatSchools NC. The engagement strategy is forward-looking with plans for volunteerism, advisory councils, and community events. There is not a specific evidence provided with how many families indicated their interest or how represented those families are.

Q119.**Attach Appendix A: Evidence of Community/Parent Support.**

- **Provide evidence that demonstrates parents and guardians have committed to enrolling their children in your school.**
- **You must provide evidence through a narrative or visual of this educational need through survey data, or times and locations of public meetings discussing this proposed charter school.**
- **(Please do not provide more than one sample survey form).**

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

Total Files Count: 5

Applicant Evidence :

Statement of Need - ...

Uploaded on **4/25/2025**
by **David Ayer**

Jessica Kelly

Comments :

More of a narrative than evidence of parent/guardian commitment.

9.2. Purposes of the Proposed Charter School

Q120. **Select one or more of the six legislative purposes the proposed charter will achieve, as specifically addressed in the NC charter school statute GS 115C-218, and the proposed school's operations. The Six Legislative Purposes of a Charter School are:**

- [x] 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.
- [x] Provide parents and students with expanded choices in the types of educational opportunities that are available within the public-school system.
- [x] Improving student learning.
- [x] Increasing learning opportunities for all students, with a special emphasis on at-risk or gifted students.
- [x] Encourage the use of different and innovative teaching methods.

Jessica Kelly

Comments :

The applicant selected 5 out of the 6 legislative purposes.

Q121. **Provide a brief narrative to coincide with <u>each</u> applicable legislative purpose(s).**

Create new professional opportunities for teachers, including the opportunities to be responsible for the learning program at the school site: Knowing the potential in community connections, we will foster strong partnerships with families and individuals within the local community and local organizations. Community members who are multilingual can use their gifts in translanguaging and their native language to support children in developing their language skills, support one another as an affinity group within the school community, and be the link and barrier breaker between the school and the community. By honoring the lived experiences and backgrounds of folks in the surrounding community, Encompass will encourage equitable participation for families of all backgrounds.

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.

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 would not have 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 2-3 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. 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.

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.

Increasing learning opportunities for all students, with a special emphasis on at-risk or gifted students: Using NC's Economically Disadvantaged Student lottery preference will ensure these families have access to an enriching and liberatory 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.

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 teaching. 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.

Jessica Kelly

Comments :

The applicant touched on new teacher opportunities, innovative instruction, student learning, and access for at-risk students. The Montessori residency model is an innovative plan to train local educators on-site. The commitment to inclusion and instructional diversity is shown through a strong sense of push-in models and translanguaging support. The applicant describes alignment but lacks clarity on how these goals will be tracked or measured.

9.3. Goals for the Proposed Charter School

Q122.**Provide specific and measurable goals for the proposed school for the first 5 years of operation outlining expectations for the proposed school's operations, academics, finance, and governance. Address how often, who, and when the information will be communicated to the governing board and other stakeholders.**

Goal 1, Student Academic Targets

(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' students will demonstrate achievement or growth in Reading/ELA as measured by i-Ready or another benchmark reading 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 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.

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.

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.

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.

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. Success will be measured by timely reporting, strong stakeholder engagement, and steady progress toward key operational benchmarks.

Jessica Kelly

Comments :

The applicant specified academic growth targets in reading and math with clear performance benchmarks. The social-emotional development goal use a nationally normed tool (MEFS) which adds depth beyond academic metrics. There are clear teacher certification expectations, with a reasonable and progressive 5-year target of 85% certified. The enrollment goals are tiered and include retention rates, reflecting and planning around sustainability. The emphasis on program fidelity via the NCMPS rubric shows alignment with Montessori standards. The governance accountability includes monthly updates and specific reporting responsibilities for leadership. The academic goals rely heavily on a single assessment tool, which could limit responsiveness to varied student needs. The social-emotional benchmarks might be hard to standardize across diverse learner profiles. The community engagement goal lacks key point indicators to measure effectiveness or participation rates in events.

Q123. 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.

Jessica Kelly

Comments :

The multifaceted approach to oversight includes assessment data, attendance, behavioral data, and essential elements review. The use of structured timelines with reviews that occur three times a year, and the annual rubric guide to evaluate the program. The communication pathways between leadership and the board are clearly stated. The biannual essential elements review adds qualitative analysis of how Montessori principles are being enacted. There is a heavy emphasis on internal reported, limited mention of third-party or comparative results which could be more diversified data sources. There is no mention of stakeholder feedback in assessing mission alignment.

Section

Jessica Kelly

Ratings

Meets the Standard	The response meets the criteria in some aspects, but lacks sufficient detail and/or requires additional information in one or more areas.

Comments :

The applicant meets the standard however there is some lacking evidence; specifically the evidence of parent/guardian commitment.

10. Educational Plan

10.1. Instructional Program

Q124. Provide a detailed description of the overall instructional program of the proposed charter school, including:

- major instructional methods
- assessment strategies, and
- explain how this instructional program and model meet the needs of the targeted student population

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/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)

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/1kL4oyw0lR2lBj43hOMBEQjJWd56OFbse/view)

1. Comprehensive age-appropriate curriculum
2. Hands-on, concrete materials
3. Prepared Teachers
4. Multi-age/loooped 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

- **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 partner with NCMPS and other approved North Carolina public Montessori programs to develop and implement a Montessori curriculum aligned to North Carolina standards.

Kindergarten

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–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.

- **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 - 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/montessori_science_genius.htm)
  - Chapter 2: The Impact of Movement on Learning and Cognition
  - Chapter 5: Interest in Human Learning

- **Prepared Teachers**

Montessori teacher preparation entails mastery of the complete curriculum and materials including

lesson planning, delivery, observation, tracking, and assessment. This deep preparation allows teachers to follow each child's individual trajectory of learning, offering 1:1 or small-group targeted lessons at just the right time for maximum learning and growth.

Encompass will leverage NCMPS' experience in the field to hire and support appropriately prepared teachers. Where appropriately prepared teachers are not available, Encompass will work with NCMPS to prepare teachers through NCMPS's teacher residency program and develop its own in-house teacher preparation and support program to ensure a steady pipeline of teachers.

- **Multi-age/loooped classrooms**

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

- **A high degree of agency/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/montessori_science_genius.htm)
  - Chapter 3: Choice and Perceived Control.

- **Extended 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.

- **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.

- **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:

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 and 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 the students experience great autonomy within the classroom in terms of what to work and for how long in any given day, the continuum of learning in the curriculum is quite explicit and at each level the student masters the needed skills before moving onto the next.
- 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.

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)

Jessica Kelly

Comments :

The Montessori model is research-backed and is supported by multiple longitudinal and peer-reviewed studies showing positive academic, behavioral, and social outcomes. The focus on whole-child development integrates academic achievement, executive function, social-emotional growth, and independence. The emphasis on incorporating community norms and identities is culturally responsive. There is a strong equity lens which cites positive outcomes for diverse demographics, especially low-income and minority students. While the data is strong, the application may be overly dependent on Montessori-specific data rather than how this approach aligns with current NC public school standards. There is limited discussion of how fidelity will be maintained in a public school setting with potentially less training and few resources than private Montessori schools.

Q125. **Will the proposed charter school serve a single-sex student population?**

- ○ Yes
- ◉ No

Q129. **Curriculum and Instructional Design** Describe the basic learning environment (e.g., classroom-based, independent study), including class size and structure for each grade span (i.e. elementary, middle, high) the school would ultimately serve.

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 enforce 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.

In Kindergarten, the **morning 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 **morning 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 **large, open-ended research projects**, **small group lessons**, and **independent practice** 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 period** 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 **Arrival** and a period of **Open 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 **Integrated Studies** 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 Specialist** (covering English Language Arts and Social Studies) and a **Math and Science Specialist**. 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 **Tuesday and Thursday afternoons**, students participate in **Self-Expression** 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 **Advisory** sessions focused on social-emotional development and leadership, and the other four days include a daily period of **Reflection and Planning** 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.

Reference:

• 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)

Standardized Test Proficiency

A multi-state study compared standardized test proficiency of Montessori schools with districts. Comparing Montessori school scores with district scores in the 10 states/regions with the most

public Montessori schools, the study found that students in Montessori schools showed greater ELA proficiency in 8th grade with a trend to greater proficiency in math. “Black, Hispanic, and economically disadvantaged students at Montessori schools were more proficient on ELA tests, and performed better or similarly on math tests.... Achievement gaps were generally smaller.”

Reference:

• 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)

The North Carolina Accountability Model (https://sites.google.com/view/laws-policies/nc-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.

Jessica Kelly

Comments :

The curriculum integrates multiple content areas and allows for exploration and inquiry making it comprehensive and interdisciplinary.

Q130. **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.**

The mission of Encompass Montessori is to deliver high-quality Montessori education for all of its children, including those who are economically disadvantaged, multilingual learners, or have special education needs. Encompass will build a representative student body using North Carolina's Weighted Lottery Guidance (https://www.dpi.nc.gov/documents/fbs/charterschools/amendments/weighted-lottery-guidance-01-23-20-revised/download).

Encompass will use public school resources created by the NCMPS to ensure that the Montessori curriculum is high-quality and fully implemented, delivering the outcomes in academic achievement, executive function, and general well-being Montessori is known for. Montessori teacher preparation includes child development, methods of instruction, learning materials, and a deep knowledge of specific curriculum that includes math, language arts, natural sciences, social studies, practical life skills and sensorial development. Using NCMPS's *Montessori Curriculum to Standards Alignment* as a model and template, Encompass Montessori will ensure that its Montessori curriculum is inclusive of and meets or exceeds all NC Standard Course of Study (NCSCOS) standards.

Fully implemented Montessori curriculum that meets or exceeds the NCSCOS will be used as the MTSS-Tier 1 curriculum that is offered to all students in every classroom. The curriculum is language-, visual-, and tactile-rich, which serves all learners well and is especially beneficial to multilingual and special education learners (Harting, Caitlin M. 2015; Reddy, R. 2020). In addition, teachers will continue professional development to learn how to further adapt the materials and teaching methods to the needs of multilingual and special education learners. Most of this instruction will take place within the classroom for full inclusion in least restrictive environments. At times, and dependent on individual student needs, additional support will be provided in pull-out settings and using additional methods such as Orton-Gilligham.

Evidence of the Montessori Curriculum's Success across Demographics:

South Carolina

A large-scale study of South Carolina's 45-school public Montessori program found that: "**students in public school Montessori classrooms across the state are faring well**, as compared to similar non-Montessori public school students, when examining academic, behavioral, and affective outcomes."

The study looked at schools with a range of demographics and found positive outcomes across categories:, "Most Montessori programs are in Title I schools, and the majority of students are low-income. Approximately 55% of Montessori students are white, while 34% are black and 10% are Hispanic. One in ten Montessori students has a special education designation... Montessori students are generally quite similar demographically to other public school students across the state."

◦ **Academic Outcomes:** "When compared to non-Montessori public school students across the state, Montessori students were **more likely to have met or exceeded the state standards**."

• **Affective Outcomes:** "Montessori students generally perform **similar to or better than non-Montessori students on assessments of executive function**...Montessori students exhibited **significantly higher levels of creativity** than non-Montessori students."

• **Behavioral Outcomes:** "Montessori students consistently demonstrated **higher school attendance** than matched non-Montessori students after adjusting for the attendance rate in the previous year and student characteristics. Furthermore, Montessori students were **significantly less likely than similar non-Montessori students to have had a disciplinary incident or have served a suspension** during the school year."

• **Low-income populations:** "Low-income Montessori students exhibit more growth in ELA, math, and social studies than low-income non-Montessori students."

• **Demographics subgroups:** "In terms of race, significant differences exist for black students in ELA and social studies, with Montessori students displaying greater growth."

Reference:

• 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)

Hartford, CT Study:

Research has shown that Montessori (which has its origins with high-poverty communities in economically distressed areas) is an effective intervention with low-income families, and has narrowed test score differences across demographics.

Figure 5

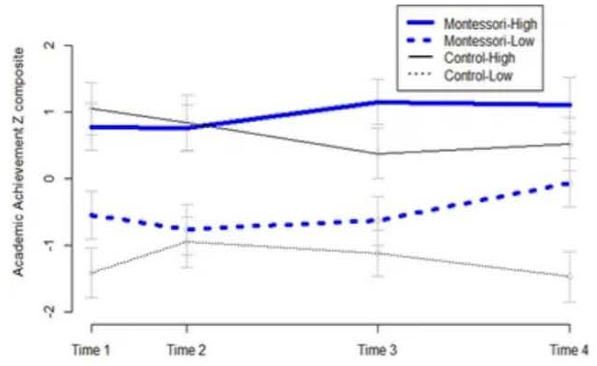


FIGURE 5. Academic achievement across four time points by school condition and income group. Although equal to the lower income control children at Time 1, by Time 4 the lower income children in Montessori showed a strong positive trajectory towards closing the achievement gap with the higher income children in control and Montessori schools. Standard error bars are shown.

Reference:

• 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)

Standardized Test Proficiency

A multi-state study compared standardized test proficiency of Montessori schools with districts. Comparing Montessori school scores with district scores in the 10 states/regions with the most public Montessori schools, the study found that students in Montessori schools showed greater ELA proficiency in 8th grade with a trend to greater proficiency in math. “Black, Hispanic, and economically disadvantaged students at Montessori schools were more proficient on ELA tests, and performed better or similarly on math tests.... Achievement gaps were generally smaller.”

Reference:

• 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)

The North Carolina Accountability Model (https://sites.google.com/view/laws-policies/nc-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.

Jessica Kelly

Comments :

The mixed-age classrooms and looping promotes long-term relationships and peer learning. The listed Montessori materials are clearly aligned to grade levels and subject areas. While the curriculum is rigorous, specifics on alignment to the NC Standard Course of Study could be expanded. Implementation may be difficult at scale, particularly with teacher training and procurement of authentic Montessori materials.

Q131. **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.**

The Montessori approach integrates a model of human development, a comprehensive curriculum, unique materials, and a collection of instructional strategies. Teachers learn and master these strategies during preparation, practice, and ongoing school- embedded professional development and instructional coaching.

Offering a prepared environment–to create a calm classroom in which students are able to focus and operate independently and joyfully

The physical set-up, the environment, of a Montessori classroom is of paramount importance. The Montessori classroom is a calm, well-organized environment stocked with learning materials: Specially designed Montessori materials, other purchased materials, teacher-made materials, supplies, etc. There are many open shelves displaying materials which are organized by subject area, and many areas for individual and small group work whether on the floor or at tables.

Teachers prepare orderly, beautiful, uncluttered classroom environments that represent the cultural backgrounds of their communities, and arrange them to facilitate independent learning and exploration. These characteristics support executive function development and academic achievement. Environments at the various age levels are prepared with the characteristics of children at that age in mind. So, for example, the kindergarten classroom includes beautiful shelf work that draws young children in because of its physical appeal. In the elementary classroom, for example, the arrangement of tables and chairs facilitates the small group work and collaboration that is so developmentally appropriate and on-target for these age groups. And, in the middle school environment, flexible spaces allow for core-content instruction, cross-curricular work, and community gatherings - each aligned to the adolescents' need for applied learning and social interaction.

Observation and record-keeping–to ensure each student is progressing, catch when students aren't, and know what each student's needs are at any given time

Observation is the foundation of Montessori teacher practice. Teachers learn to observe to determine each child's mastery of previous lessons and readiness for new work, and to identify challenges and opportunities for development. Teachers observe children's independent activity and keep careful records of lessons presented, work practiced or completed, and skills mastered to

help children meet benchmarks as they move through the curriculum.

Montessori lessons–presenting targeted, precise lessons in a specific sequence to build each student's academic skills

Each Montessori material has a lesson or set of lessons associated with it, and teachers are expected to master the entire set and be prepared to present them as appropriate when children demonstrate that they are ready for them. Lessons form a sequenced continuum with multiple interconnections across disciplines and a range of pathways through the curriculum. Teachers are expected to present lessons to individual children or small groups in Kindergarten, and to small groups in 1st-6th grade and middle school. Classroom assistants help protect lessons from interruption by problem-solving and redirection as needed.

Lessons are tuned to the characteristics of children at various age levels. Teachers present Kindergarten lessons using clear, precise movements and carefully chosen language that can be easily absorbed and replicated by young children. Teachers learn to present lessons for elementary students that appeal to reason and imagination and inspire group work to take advantage of children's sociality. For middle school, teachers learn to facilitate lessons that require further social development and appeal to students' drive for social belonging and self-expression.

Choice–to develop executive function and self-awareness and increase student interest and engagement

Montessori teachers are trained and expected to support independent choice in students. Teachers learn to prepare the environment with appropriate, learning-intensive choices, and teachers set expectations for appropriate classroom behavior and activities. Teachers invite students to lessons, offering a degree (but not total) choice to students as to when to engage with what). When presenting a lesson, teachers learn to protect that space from interruption from other students so as to honor the student's choice and support focus. After they've presented a lesson, teachers set expectations for choices of follow-up work with new material. "Freedom and choice with...within a carefully designed, ordered structure...are linked to better psychological and learning outcomes." (Lillard, A. 2017. Montessori: The Science Behind the Genius (https://www.montessori-science.org/montessori_science_genius.htm), p29)

Kindergarten specific strategies

Literacy instruction grounded in the Science of Reading

Montessori has implemented and refined techniques which have now been validated by Science of Reading research. *Vocabulary Enrichment* is an essential Montessori strategy, and the classroom environment is rich in items that can be precisely named in speech and writing. Phonemic awareness is developed through the *Sound Game (I Spy)*, where children identify initial, medial and final sounds in a group activity with familiar and attractive objects. Letter-sound correspondence is introduced with *Sandpaper Letters*, letters cut from sandpaper and mounted on boards so children can trace the shapes and match the sounds. Formation of words is taught with the *Moveable Alphabet*, a set of individual letters which can be manipulated and arranged to form words. Decoding is taught with the *Phonetic Object Box*, with which children develop phonetic reading. Further materials support additional literacy development.

Teachers support comprehension through read-alouds, book talks, and a content-rich environment through which children gain the experience and content-knowledge that is essential to reading comprehension.

Mathematics instruction with manipulatives

Mathematics instruction follows a similar trajectory with a suite of carefully designed materials: *Sandpaper Numerals* for numeral identification, *Number Rods* and *Spindle Boxes* for number-as-quantity and number-as-set, *Teen Beads and Boards* for counting through 20, *Golden Bead Material* for operations and place value, and many more.

The Montessori Kindergarten curriculum includes many more materials and strategies for supporting young children's learning, including sensorial development, motor coordination, executive function skills, and more.

1st-6th grade-specific strategies

Inspiring, evocative lessons

The Montessori elementary curriculum is built on elementary-aged children's expanding powers of reason, imagination, and wonder. Teachers learn to introduce broad areas of study (such as physical science, life science, history, mathematics, etc.) with grand stories and demonstrations that inspire curiosity and exploration.

Project-based follow-up work

Montessori elementary teachers support children in follow-up explorations from inspiring lessons that may be group projects spanning a number of days and can include class presentations, experiments, constructions, and excursions into the community. Teachers gently guide students to shape and track the outcomes of these projects and learning.

Work journals and conferencing

In the elementary classroom, students record their work in journals of their own. Teachers have regular conference meetings with students to review their work, identify and support difficulties, and make plans for further follow-up or new lessons. Teachers and students reference public school standards and expectations to ensure that benchmarks are met.

Middle school-specific strategies

Social engagement

At the middle school level, teachers leverage students' intense sociality by incorporating social aspects into lessons and academic work. For example, students may survey classmates or measure aspects of the school community in social studies and mathematical explorations, and typically work in small groups, negotiating shared responsibilities and contributions.

Community engagement

Teachers facilitate students' engagement with their surrounding community to further learning, helping them find and invite outside experts, travel to make use of external resources such as libraries and museums, and supporting meaningful work in their school community and beyond.

Summary of research:

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)

In this large-scale evaluation of South Carolina's 45+ public Montessori schools, Montessori students met or exceeded standards more often than non-Montessori students, including lower-income students. Montessori students had higher attendance and fewer disciplinary incidents and suspensions.

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

In this randomized study of public Montessori schools in Hartford, CT, Montessori children performed better on measures of academic achievement, social understanding, and mastery orientation, and differences between lower-income and higher income children disappeared.

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

This comprehensive book about the theory behind Montessori education and its relevance to outcomes lays out the foundations for its effectiveness.

Lillard, A. et al. 2021. An Association Between Montessori Education in Childhood and Adult Wellbein g (https://www.ncbi.nlm.nih.gov/pmc/articles/PMC8656358/)

This study of nearly 2000 adults found a strong association between time spent in Montessori schools and reported well-being.

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)

In a systematic review of Montessori research considering 2000+ articles, researchers found evidence that Montessori education outperformed traditional education on a wide variety of academic and nonacademic outcomes.

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)

In this study of the ten states or regions with the most public Montessori schools, Montessori students showed greater ELA proficiency at 8th grade than their non-Montessori peers, with a larger effect for Black, Hispanic, and economically disadvantaged students

Jessica Kelly

Comments :

The emphasis on small group and individual instruction meets students where they are through differentiation. The focus on executive function embeds skills such as time management and self-monitoring into daily instruction. The extended work periods and reflection cycles promote depth of learning. The success depends heavily on student-self motivation and ability to self-regulate, which may challenge certain populations without additional supports. Some strategies (like observation-based instruction) may be difficult to standardize or evaluate with fidelity.

Q132. **Explain how the proposed instructional plan and graduation requirements will ensure student readiness to transition from grade to grade and to the next grade span upon program completion.**

The Montessori instructional approach and materials described throughout give students multiple pathways and opportunities to master content and skills before progressing to the next area or skill. Students move from concrete to abstraction and may, when needed, spiral back to concrete or prior material and then, when confident, move forward again. Students track their own learning and progression through work journals and presenting at family-school events and conferences. This progress is guided by teachers who understand the Montessori curriculum and have a number of tools on hand to support tracking of student progress.

The National Center for Montessori in the Public Sector (NCMPS) has developed a clear, standards-aligned curriculum, along with guidelines and benchmarks for the material students need to have mastered over their time at a given age level (Early Childhood Skills Inventory, Lower Elementary Skills Inventory, Upper Elementary Skills Inventory, Adolescent Skills Inventory, see excerpts below). Encompass will use NCMPS' skills inventories as the framework for Montessori learning outcomes and cross-walk them with North Carolina's standard course of study to ensure that Encompass' inventories meet the needs of North Carolina's students. An NCSCOS-aligned Montessori curriculum means that students will, throughout each level of instruction, be working with and learning the lessons that will prepare them to meet the skills inventory to progress to the next level. Encompass teachers will keep detailed records of each child's progress through the curriculum, using an online tracking tool such as Transparent Classroom, and complete Skills Inventories at regular reporting intervals (to be shared with parents).

In addition to these in-school Montessori records of learning and progress made, Encompass' instruction for each student and the school as a whole will be informed by the required state accountability assessments. Where challenges are observed, teachers and school leaders will examine the curriculum next to the outcomes and develop curricula to ensure students are learning what they need to successfully progress and transition to the next level. In sum, by 1) implementing a rigorous standards-aligned curriculum that is in constant check against the NCSCOS, 2) teachers' carefully observing, assessing and recordkeeping using Transparent Classroom and NCMPS observation tools and Skills Inventories and 3) analyzing state assessment data to inform curriculum development and instruction, Encompass Montessori will work with each student to ensure they are progressing and ready to transition to the next level and, on completion of grade 8, to their next school for high school.

In a case where a student is struggling to progress sufficiently to be on track to meet the benchmarks, Encompass will enter that student into the NCMPS Child Study process in partnership

with a child support team and the family. Child Study, an MTSS/RTI system with a Montessori lens, broadens the scope and intensity of interventions, the frequency of assessing results of the interventions, and degree of family contact and participation.

Excerpts from grade-level transition tools (also linked—document upload not functioning):

Primary Skills Inventory (https://drive.google.com/file/d/13KWWzJMpVWfFjt1YzFj1jGXESxhsIHDu/view?usp=sharing)

Lower Elementary Skills Inventory (https://drive.google.com/file/d/13IXk3BxwwULkUPk2AvDf3LJVOpqn2gdd/view?usp=sharing)

Upper Elementary Skills Inventory (https://drive.google.com/file/d/13HTvH5X1ro5HdCBJlBFA9OuRBojFRvP9/view?usp=sharing)

Primary Skills Inventory

This tool assesses a child's progress towards the expected outcomes of three years in a Montessori Primary (PK3–K) environment. It can be used as a benchmark and a lesson planning guide during a child's time in the environment, and as a summative assessment in the year before entering Lower Elementary.

Child: _____ Date of birth: _____ Age: ___ Grade: ___

Teachers: _____ Date: _____

Level key:	E = Emerging	R = Refining	A = Applying

SKILL	LEVEL	NOTES
EXECUTIVE FUNCTIONS		
Chooses and initiates appropriate work independently.		
Completes an activity cycle, including selecting an activity, engaging with the activity, and returning it ready for use by another child.		
Follows multi-step directions and completes multi-step sequences.		
Observes without disturbing the work of other children.		
Waits for a turn and/or shifts when an activity, material, person, or location is unavailable.		
Persists in the face of challenges and attempts multiple ways of solving a problem.		
Maintains focus amid classroom activity.		
Regulates physical behavior (e.g., navigating room, managing clothing, toileting) independently.		
Appropriately handles classroom materials and cares for the classroom environment.		

Upper Elementary Skills Inventory

This tool assesses a child's progress towards the expected outcomes of three years in a Montessori Upper Elementary (4th–6th grade) environment. It can be used as a benchmark and a lesson planning guide during a child's time in the environment, and as a summative assessment in the last year of Upper Elementary.

Child: _____ Date of birth: _____ Age: ___ Grade: ___

Teachers: _____ Date: _____

Level key:	E = Emerging	R = Refining	A = Applying

MATHEMATICS		
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.		
Uses communication in all areas of the Montessori math curriculum by constructing viable arguments or critiquing the reasoning of others through collaboration, use of vocabulary (Montessori, academic, domain-specific) and reasoning with the Montessori materials and relating to real-world applications.		
Uses Montessori materials in all areas of the Montessori math curriculum including choosing the appropriate Montessori material or model (drawing, table, chart, graph) to set up math equations or solve real-life problems.		
Looks for and recognizes patterns in all areas of the Montessori math curriculum and reasons about mathematical structures.		
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		

Lower Elementary Skills Inventory

This tool assesses a child's progress towards the expected outcomes of three years in a Montessori Lower Elementary (1st–3rd grade) environment. It can be used as a benchmark and a lesson planning guide during a child's time in the environment, and as a summative assessment in the year before entering Upper Elementary.

Child: _____ Date of birth: _____ Age: ___ Grade: ___

Teachers: _____ Date: _____

Level key:	E = Emerging	R = Refining	A = Applying

LANGUAGE		
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.		
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.		
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.		
Demonstrate command of the conventions of standard English		

Jessica Kelly

Comments :

There are multi-dimensional assessments including i-Ready, NC EOGs, and Montessori-specific measures. The growth-focused benchmarks provides tiered performance expectations based on time enrolled in Montessori model. Combining Montessori tools with state-mandated assessments may overwhelm staff or create conflicts in instructional pacing. Clearer articulation of the grade-level progression standards would be beneficial.

Q133. Describe in a brief narrative how the yearly academic calendar coincides with the tenets of the proposed mission and education plan.

Encompass Montessori will follow the conventional academic calendar so that students in the school are on a similar schedule as other children in the area, easing the burden of out-of-school-time needs for families and increasing ease of access for families with children in multiple schools.

In accordance, the school year will be a minimum of 187 school days, run from approximately the end of August through mid-June, and comprise at a minimum the NC required 1,025 hours of instructional time.

Applicant Comments :

Encompass Montessori will follow the conventional academic calendar so that students in the school are on a similar schedule as other children in the area, easing the burden of out-of-school-time needs for families and increasing ease of access for families with children in multiple schools.

In accordance, the school year will be a minimum of 188 school days, run from approximately the end of August through mid-June, and comprise at a minimum the NC required 1,025 hours of instructional time.

Jessica Kelly

Comments :

The applicant explains sufficiently how the academic calendar ties into the mission.

Q134. 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 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. For Kindergartners, arts may take place in their classroom as individual or small group work, while 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.

Jessica Kelly

Comments :

The applicant outlined the daily schedule for teachers, elementary and middle school students.

Q135. **Describe a typical day for a teacher and a student in the school's first year of operation.**

Teachers arrive at 8am and use the time from 8am - 8:30am to prepare the classroom environment, coordinate for the day with their assistant teacher, or meet with families. When students arrive at 8:30am, the teacher greets them at the door and may inquire whether they know what work they will begin the day with and guide them toward work as appropriate. When students are settled in their work, the teacher then spends the morning work period using her lesson tracking and planning in combination with observations of student engagement to invite students to small group and 1:1 lessons or conferences with students looking at their work journals to track and discuss their learning progress across all subject areas. The classroom assistant assists in the smooth running of the room by redirecting students and helping out as needed so as to protect and preserve the teacher's ability to give lessons. The assistant also monitors and signs out students who are leaving for a co-curricular class. When the teacher has completed giving a lesson and the student(s) are ready to carry-on individually, the teacher observes how the students are working and invites the next student to a lesson.. This is the pattern that continues through the morning and then afternoon work cycles. Typically, teachers will offer 5 - 10 lessons in the morning and again in the afternoon

At 11:30 the teacher gathers students1 for a community meeting, read-aloud, etc and then dismisses them to lunch and recess. During lunch and recess, classroom teachers have a break while assistants, instructional coaches, and co-curricular teachers, staff, and administrators eat lunch with students and supervise recess.

Teachers return at 1pm for the afternoon work cycle, clean-up and dismissal. Teachers use the remaining time until 4pm to make notes on student progress, replenish what needs freshening in the classroom, and meet with fellow teachers for Child Study, Lesson Study, and coaching. Once a week, there is a full faculty meeting until 5pm.

Students arrive at school eager to return to the work they left the prior day. Students enter the room and are greeted personally by one of the adults. They will typically take care of their personal belongings (hang up their coats, change their shoes, put away their lunch boxes, etc.), retrieve their work journal in which they record their work for the day, and then look to begin school activities. Students choose activities from those they have been introduced to unless they are called to a lesson right away. The teacher and classroom assistant will help students get connected to suitable activities as necessary. (At the beginning of their time in a classroom, students will only have access to a limited repertoire of choices but before long they will have been introduced to a number of engaging activities from which to choose.)

Students work with their chosen activity for as long as interest and engagement holds. The classroom assistant is available for support, and to redirect children to appropriate activity as needed. When they are done with a certain piece of work, the student records their progress in their work journal (the recordings get increasingly detailed and reflective as students move through the grades), put away their work, and choose their next one. There will be a daily snack available in the classroom that students can choose to eat when they are hungry and there is an open spot at the snack table.

During these extended work periods, students are invited to 1:1 and small group lessons by the teacher. Depending on how the student is progressing, these “invitations” may be more or less directive as the teacher ultimately is responsible for ensuring that all students are working and progressing in all areas. Every student will get at least one lesson each day and, depending on how they are progressing, they may receive more. Students will also be invited to conference with their teacher once a week to discuss their work journal and progress. During this time, teachers point out areas that need more attention and time and student and teacher together discuss how to make this happen and when to check back in on it.

Students will also participate in co-curricular classes during the extended work period, excusing themselves quietly when it is time to attend a class and then returning to work upon the class’s ending. Students track their participation in co-curricular classes in their work journals, while the classroom adults also keep records. Though to the largest extent possible, English learners and students requiring special education services will receive all instruction inside their full-inclusion classroom, should they need to receive instruction outside of the classroom, they will similarly leave and return during the extended work periods.

Just before 11:30, students are asked to bring their work to a close either by putting a sign on it that it is “in progress” or by returning it to the shelf. They then join their classmates in a community meeting for reading, sharing, discussing, singing, etc. Following the meeting, students eat lunch and have recess. They return from recess re-energized for the afternoon work cycle

Jessica Kelly

Comments :

A detailed daily schedule was described or teachers and students.

Q136. **Will this proposed school include a high school?**

- ○ Yes
- ◉ No

Q142. **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 Comments :

(This is how we submitted answers on 4/25. PDFs of the documents are now uploaded - 5/21)

Unable to upload document—button not working. Curriculum Outlines linked here:

Q142 - MCSA - Elementary Geometry - Full Scope (https://drive.google.com/file/d/1PDjNEaoLnhNR9kMfX_UGcw2rNDU019f_/view?usp=sharing)

Q142 - Elementary Lesson Sequence - All Subjects (https://drive.google.com/file/d/1Blo3eOE2jfL9AyWBDZja40LQA4o2ap4A/view?usp=sharing)

Q142 - Grade 7 & 8 Science Curriculum Outline (https://drive.google.com/file/d/1DMIMDnd4YIp2D2cmXEOZ4G9BJurytIbw/view?usp=sharing)

Applicant Evidence :

Q142 - Grade 7

Uploaded on **5/21/2025** by **Candace Fletcher**

Q142 - MCSA - Kinde...

Uploaded on **5/21/2025** by **Candace Fletcher**

Q142 - Kindergarten ...

Uploaded on **5/21/2025** by **Candace Fletcher**

Q142 - MCSA - Eleme...

Uploaded on **5/21/2025** by **Candace Fletcher**

Q142 - Elementary L...

Uploaded on **5/21/2025** by **Candace Fletcher**

Q143. **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 Comments :

(This is how we submitted answers on 4/25. PDF of the document is now uploaded - 5/21)

Unable to upload document—button not working. Calendar linked here:

Encompass Montessori 2027-28 School Calendar (https://drive.google.com/file/d/1FrGz2o-XkI_NfR-TwdILlRmF8K84qNhy/view?usp=sharing)

Applicant Evidence :

Q143. Encompass M...

Uploaded on **5/21/2025** by **Candace Fletcher**

Q144. **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 Comments :

Unable to upload document—button not working. Schedules linked here:

Daily.Weekly Schedule K-6 (https://drive.google.com/file/d/1G8YoDiTQCXj_OTTn-Bb4FqJMcBc06z4c/view?usp=sharing)

Q144 - Middle School Program Schedule (https://drive.google.com/file/d/1pzcI4yUOY3nora3C4QMeUiY-AlMAUu2M/view?usp=sharing)

Applicant Evidence :

Q144 - Middle Schoo...	Daily.Weekly Schedu...
Uploaded on **5/21/2025** by **Candace Fletcher**	Uploaded on **5/21/2025** by **Candace Fletcher**

10.2. Special Populations and "At-Risk" Students

Q145. **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 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 must take note if a student is falling behind the suggested 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.

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, playing close attention to children who are not progressing at expected rates.

NCMPS Screeners for Early Childhood (Normalization Check) and Elementary (Adjustment Check) 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." 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.

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 supports. 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.

Tier II: Targeted Support

Children who show the need for more than Universal supports 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
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. However, a a combination of strategies can help many at risk students succeed and stay in school.

Jessica Kelly

Comments :

All instruction is designed to occur in the least restrictive environment (LRE), with pull-out services only as needed. A structured, multi-tiered intervention (aligned with MTSS/RTI) is in place to identify needs early. Teachers will track student progress using Transparent Classroom and Montessori-aligned observation tools. The plan lacks detail on how many EC specialists will be hired or how related services will be provided. While IDEA compliance is implied, the process for IEP creation, annual review, and parent involvement isn't fully described.

Q146. **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.

Candace Fletcher, MEd has successfully passed the California Teachers of English Language (CTEL) Examination, trained in systematic English Language Development and SDAIE Strategies. She worked with and has extensive experience teaching multilingual learners as identified by scores on WIDA and ELPAC assessments. She has supported children with IEPs and 504 plans in the general education classroom and has been a participant in Multi-tiered Support Systems (MTSS) teams in Ohio, California and Nevada.

Carol Pirello is a social worker whose experience includes a decade as a school guidance counselor where she coordinated special education services, led intervention teams, and managed various student well-being issues.

Sara Suchman, MAT, MBA, EdD holds an MAT in English as a Second Language from the School for International Training. She worked with MLs in Fairfax County Public Schools (VA) as a middle school teacher, teacher leader, and curriculum developer. Dr. Suchman also worked and taught extensively with English learners living abroad in Mexico, Thailand, and Japan.

In addition to this Founding Board experience, all Encompass teachers will take a special education 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.

Jessica Kelly

Comments :

The applicant provided a description on each of the board member's who have had experience in working with special populations; 4 of the board members have experience.

Q147. 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 theHLS with a standardized language proficiency screening such as the WIDA ACCESS Placement Test to determine their English language proficiency level.
- **Avoiding Misidentification:**
  - **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 II (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.

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, 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.
- **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.
- **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.

Jessica Kelly

Comments :

The WIDA Screener and ACCESS assessments will be used for identification and progress monitoring. The use of visuals, manipulatives, and language-rich environments naturally support ELLs. There is an intent to offer materials and events in families' native languages. The application doesn't specify whether there will be a dedicated ESL teacher or how instruction will be delivered. There is no mention of how ELL's academic growth will be tracked across subjects beyond ACCESS.

Q148. **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 (Natio nal Association for Gifted Children—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 As sociation for Gifted Children—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.

References:

- Classroom Strategies: Teaching Gifted Students (https://www.edmentum.com/articles/classroom-strategies-teaching-gifted-students/)
- National Association for Gifted Children—Gifted Education Strategies (https://nagc.org/page/Gifted-Education-Strategies)

In all these ways, the Montessori classroom is inherently predispositioned 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.

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.

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.

Jessica Kelly

Comments :

The applicant provided a detailed description on the support they will provide for their academically gifted.

10.3. 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.*

Q149. **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.

Jessica Kelly

Comments :

The applicant plans to utilize standard protocol for identifying students.

Q150. 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.

Jessica Kelly

Comments :

The applicant will utilize the MTSS process for identifying students not yet identified.

Q151. **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.

2. 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.

3. 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.

Q152. **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 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.

Jessica Kelly

Comments :

The applicant could strengthen their response by including a description for mild, moderate, and severely disabled; the current response is more general.

Q153. **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**
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

Jessica Kelly

Comments :

The full continuum approach the applicant described addresses the areas of need and the alignment with Montessori-based support.

Q154. **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.

Jessica Kelly

Comments :

The methods and support systems described are supportive for the students with IEPs.

Q155. **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.

Jessica Kelly

Comments :

From an accountability perspective the applicant has indicated how reporting and monitoring will be implemented.

Q156. 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.

Jessica Kelly

Comments :

The applicant has addressed the staffing needs for related services and how they will be met.

10.4. Student Performance Standards

Q157. **Describe the student performance standards for the school as a whole.**

These self-selected goals will be examined during future site visits and reports for the school. Goals selected DRIVE what happens in the school. The responses in this section should include clear and measurable educational goals and objectives that set high standards for student performance for each grade level. These goals should expound upon the overall academic goal in the Mission and Purposes section of the application. The applicant should provide evidence that the evaluation tool(s) or assessment(s) will result in assessment data that will drive instruction, improve the curriculum over time for the benefit of students. Finally, the section should end with a list of developed clear policies and standards for promotion from one grade level to the next along with exit standards for ALL students.

Encompass' goals will be guided by the NCMPS-A-GAME (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 gain 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 Competency:

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.

Jessica Kelly

Comments :

This is a solid and thoughtful response that aligns well with Montessori practice and includes strong tools for assessment across multiple domains. However, to fully meet question it should include: promotion/exit standards, more explicit ties between assessment and instructional response, performance goals for student subgroups, and a stronger data-review and communication plan.

Q158. **Explain the use of any evaluation tool or assessment that the proposed charter school will use in addition to any state or federally mandated tests. Describe how this data will be used to drive instruction and improve the curriculum over time for the benefit of students.**

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 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.

NCMPS provides several additional tools to evaluate children's readiness for the next three year cycle (ie, the next level), 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 from 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.

Jessica Kelly

Comments :

This is a strong and well-aligned response that demontrates a thoughtful, mission-drive, and student-centered approach to assessment. It integrates Montessori-specific tools with standardized measures, giving a clear picture of how assessment will guide instruction and curriculum development. To further strengthen this response there could be clear definitions of proficiency and growth benchmarks added. The applicant could specify the assessment frequency and the roles responsible for data analysis. The applicant should explain how subgroup performance will be tracked and addressed.

Q159. Explain the policies and standards for promoting students, including students with special needs, from one grade level to the next. Discuss how and when promotion criteria will be communicated to parents and students.

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. ML students 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.

Jessica Kelly

Comments :

This inclusive response aligns well with the Montessori model and whole-child development. It emphasizes collaboration, early identification, and family involvement. The appicant could define concrete promotion standards for each domain (academic, EF, and SEL). There could be a plan included for universal communication of promotion policies at the start of each year and the timeline and documentation process could be more clearly defined.

Q160. **Provide the public charter school's exit standards for graduating ALL students. These standards should set forth what students in the last grade served will know and be able to do. Be sure to include plans for 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.

Jessica Kelly

Comments :

The emphasis on whole-child development and readiness is commendable, and the inclusion of multiple student groups suggest an equitable mindset.

10.5. School Culture and Discipline

Q161. **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. 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. 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.

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.

Jessica Kelly

Comments :

The response paints a compelling picture of a nuturing, student-centered academic culture rooted in Montessori values. The emphasis on instrinsic motivation, social development, and meaningful work is strong and well-articulated. To strengthen the response the applicant could include specific strategies for measuring or assessing culture and climate. There could be a brief reference on how the school will handle behavioral expectations or misalignment with cultural norms.

Q162. **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.

Jessica Kelly

Comments :

The response addresses the full school community and includes a plan for mid-year entrants which is ofter overlooked. It reflects a strong phiposophical and relational foundation for building school culture. The applicant could add how success will be measured and identify the responsible roles for executing culture-building tasks. Onboarding for new staff could also be included.

Q163.**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 of the charter school. 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.

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 Montesori 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

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

	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	
Step 4	Provide direct instruction around expected and unexpected behaviors: Books, social stories, etc. Provide direct instruction and resources for self-regulation: Calming strategies, physical activity breaks, noise cancelling headphones, etc .	Wraparound supports aligned with ARC (Attachment, Regulation, Competency)
Step 5	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.

Jessica Kelly

Comments :

The response is deeply informed and reflects a high level of care, developmental awareness, and trauma-informed responsiveness, all of which are exceptional strengths. The tiered mode, developmental lens, and ARC framework clearly align with the school's mission and educational plan. The applicant should explicitly describe due process procedures, detail the expulsion process, clarify how policies will be communicated to families, and add a formal grievance or appeal mechanism.

10.6. Certify

Q164. **This subsection is entirely original and has not been copied, pasted, or otherwise reproduced from any other application.**

- (●) Yes
- ( ) No

Q165. **Explanation (optional):**

Section

Jessica Kelly

Ratings

Meets the Standard	The response meets the criteria in some aspects, but lacks sufficient detail and/or requires additional information in one or more areas.

Comments :

The applicant meets the standards for the educational plan rating. Each area provides an adequate response to each question and evidence was provided where needed. The applicant could modify their responses with some of the suggestions to bring the rating to exceeds.

11. Governance and Capacity

11.1. School Governing Body

Q166. Organization Street Address (if you have one)

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

Encompass Montessori

4030 Wake Forest Road, Suite 349

Raleigh, NC 27609

11.2. 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.

Q167. Using the attached resource as a template, please complete the table depicting the initial members of the nonprofit organization.

Upload Required **File Type:** excel **Max File Size:** 30 **Total Files Count:** 3

Resources

Initial Members of t...

Applicant Evidence :

Q167. Initial Membe...

Uploaded on **4/25/2025**
by **David Ayer**

Q168. **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, who are responsible for ensuring the school's success.

The Board of Directors are 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, in conjunction with 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 directly to the Governing Board President and will attend all both 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, and will 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 reports 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 any PTO initiative rises to the level of affecting policy, mission or

vision, the matter will be brought to the board by the Principal and/or the PTO President.

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.

Jessica Kelly

Comments :

This response establishes a solid foundation of governance practices, including a clear operational divide, defined officer roles, and structural elements like board meetings, finance oversight, and committee use. It demonstrates alignment with Montessori values and legal expectations. To strengthen the response the applicant should provide a detailed process for hiring, evaluating, and supporting the school administrator. There should be a plan for recruiting and developing board members and an outline of governance capacity-building strategies.

Q169. **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 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.

Jessica Kelly

Comments :

The reponse establishes a solid foundation for governance by clearly defining board size, outlining core duties, and naming essential areas of expertise needed. It is legally sound, strategically oriented, and mission-aligned. To strengthen it further the applicant should provide details on current board composition and recruitment plans. The applicant should address the diversity, equity, and inclusion in board makeup and include structures for training, evaluation, terms, and committees.

Q170. **Describe the founding board's individual and collective qualifications for implementing the school design successfully, including capacity in such areas as school leadership, administration, and governance; curriculum, instruction, and assessment; performance management; and parent/community engagement.**

Three of the founding board members, Katie Brown, Candace Fletcher, and Sara Suchman, bring extensive experience in public Montessori education, charter schools, and school start-up. Together they have almost 27 years of experience working with the National Center for Montessori in the Public Sector (NCMPS), supporting scores of public Montessori schools and teachers through all stages of development, launch, and implementation.=

Candace Fletcher, M.Ed was a school-based educator for 14 years prior to joining NCMPS. She is a career Montessori educator and charter school leader with extensive experience in public Montessori, early childhood education, and youth development. She served as Regional Manager in a network of public Montessori charter schools, where she led the design and launch of a pre-K–6 learning center. Ms. Fletcher played a key role in securing a first-of-its-kind charter and currently supports Montessori educators nationwide as a Practicum Coordinator, Instructor, and Coach with NCMPS. She currently sits on the board of Montessori for Social Justice and brings deep expertise in instructional leadership, charter school development, and Montessori teacher training to her role.

Dr. Sara Suchman, MAT, MBA, EdD is the Executive Director of NCMPS and was a founding board member of Breakthrough Montessori Public Charter School in Washington, DC and then served on the governing board for years. At Breakthrough, she served on the Executive Committee as the board secretary, chaired the Academic Committee, and led two executive director searches. Prior to NCMPS, Dr. Suchman was a classroom teacher for eight years, a school administrator for five, a university instructor, and student-teacher supervisor. She brings experience in leadership, school administration, and performance management.

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.

Stephen Griffin has a background in risk management and insurance with vast experience in non-profit governance. Mr. Griffin is an active and involved community member, serving on Boards and committees ranging from UNC at Wilmington to the Durham Interfaith Hospitality Network. Most pertinent to his role at Encompass, Mr. Griffin has extensive experience with NC charter schools, including prior experience on two NC charter school boards–The NC School of Math and Science from 2014 - 2021 and as a founding and current board member of Granite Charter Academy. Mr. Giffin is also the chairman of the Governmental Affairs Committee for the NC Public Charter School Association.

Carol Pirrello brings extensive experience as a guidance counselor and social worker providing support and leadership for intervention teams and special education. She is committed to ensuring

that every child is well served in school and has seen that strong implementation of Montessori does this.

Stephen Griffin, Katie Brown, and Carol Pirrello are local to Wake County and eager to support a local tuition-free public Montessori option.

Jessica Kelly

Comments :

There is a strong Montessori and charter school expertise on the board with proven leadership in school start-ups. There is a broad skill set across key areas, local representation, and diverse professional backgrounds. It is suggested for the applicant to clarify gaps in expertise and how the board plans to recruit or train future members to fill those. Include examples of how the board has engaged families and communities in past roles.

Q171. **Explain how this governance structure and composition will help ensure that**
1. The school will be an educational and operational success;
2. The board will evaluate the success of the school and school leader; and
3. There will be active and effective representation of key stakeholders, including parents.

The Foundational Board is deep in members who understand the unique proposition and needs of a public Montessori school. When executed with fidelity, a Montessori education has been the gold-standard for equipping students with critical thinking, communications, teamwork, adaptability, and the ability to both self-regulate and motivate themselves to achieve. 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 educationally-focused board is integral to ensure the student educational needs are prioritized in the budget.

Seasoned non-profit organizational leaders ensure the integrity is upheld and the foundation of the school is seeded with servant leaders and board members who are committed to the mission of the school.

Using the services of a CMO will ensure the back office, compliance, vendor negotiations, lottery system, payroll paperwork, and bookkeeping are handled professionally and accurately, which will free up the administration to focus on achieving student outcomes and building a robust Montessori community. The CMO will provide the board with regular updates.

Jessica Kelly

Comments :

There is a strong emphasis on educational mission and prioritization on student-centered budgeting. There is also experience in non-profit leadership. The applicant could add details about how the board is organized and clarify the evaluation processes. Including a parent/stakeholder voice would also strengthen the response.

Q172. **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. Founding board members Katie Brown, Carol Pirrello and Steve Griffin all call North Carolina home and have deep educational experience. They 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 district was in need of schools to help serve its growing population.

Joining forces with Sara Suchman, who is the leading authority on Public Montessori and Candace Fletcher, a teacher trainer and Montessori leader who is moving to North Carolina as well. There are no vacant positions at this time. New board members will be added as needed.

Jessica Kelly

Comments :

The response clearly conveys that board members were recruited and based on a shared commitment to Montessori education, especially its expansion in the public sector for underserved students. There is not mention of a structured or criteria-based process for board member recruitment; this raises concerns about transparency, equity, and governance best practices.

Q173. **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 option. Dr. Katie Brown, a Wake County resident and Director of Research and Professional Learning at NCMPS, brings nearly a decade of charter school board experience, including at Sterling Montessori in Morrisville. Stephen Griffin, also local to Wake County, has significant leadership experience with North Carolina charter schools, including as a founding board member of Granite Charter Academy and a former board member of the NC School of Math and Science. Carol Pirrello, a long-time education professional and Wake County resident, has supported students as a guidance counselor and social worker, focusing on special education and student well-being. Their combined expertise and local engagement position them well to serve the needs of the community.

Jessica Kelly

Comments :

Several founding members are NC residents which strengthens community ties and local investment.

Q174. **Outline the strategic board calendar detailing how often the board will meet according to the bylaws established.**

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.

Jessica Kelly

Comments :

Meetings align with established bylaws.

Q175. **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 be trained in the Montessori methods 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 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.

Jessica Kelly

Comments :

The applicant indicated initial training for board members but should elaborate further on the ongoing professional development the existing board members will receive. A time table would strengthen the response as well.

Q176. **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 and 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.

Jessica Kelly

Comments :

The applicant should clarify oversight and enforcement procedures and include a timeline and frequency. The perceived conflicts can be defined more explicitly.

Q177. **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 will 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 the issue for the ED to solve.

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.

Jessica Kelly

Comments :

The decision-making processes are clearly defined.

Q178. **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 will be formed as needed to support the board and the school leadership. 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.

Jessica Kelly

Comments :

The applicant did not include the roles and duties of the stated PTO/PTA.

Q179. **Discuss the school's grievance process for parents and staff members.**

The school will develop a detailed Parent/Student Handbook 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 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.

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.

Jessica Kelly

Comments :

The grievance processes for parents and staff members is clearly outlined and there is a statement on if a resolution is not found.

Q180.**Attach as Appendix G Organizational Chart**

- **A well-defined organizational chart showing the relationship of the Board of Directors to the parents and staff of the proposed charter school. This chart should also include lines of authority to and from any outside entity that will play a role in managing or supporting the charter school (such as educational service providers, advisory bodies, or parent/teacher councils).**

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

Total Files Count: 5

Applicant Comments :

Applicant Evidence :

Org Chart.jpg

Uploaded on **4/25/2025**
by **David Ayer**

Q181. **Attach as Appendix H Charter School Board Member Information Form and Resume**

- A **one-page** resume from each founding board member and responses to the questions found on the Charter School Board Member Form

Upload Required **File Type:** pdf, excel, word **Max File Size:** 30 **Total Files Count:** 50

Resources

2024 Charter School ...

Applicant Evidence :

C Pirrello - Resume.p...

Uploaded on **4/25/2025**
by **David Ayer**

Steve Resume 2025....

Uploaded on **4/25/2025**
by **David Ayer**

C Fletcher Resume - ...

Uploaded on **4/25/2025**
by **David Ayer**

KBrown CV 1pg 2025...

Uploaded on **4/25/2025**
by **David Ayer**

Suchman_Resume_S...

Uploaded on **4/25/2025**
by **David Ayer**

C Fletcher - Q181. 20...

Uploaded on **4/25/2025**
by **David Ayer**

Q181._2024_Charter_...

Uploaded on **4/25/2025**
by **David Ayer**

Q181. 2024 KBrown ...

Uploaded on **4/25/2025**
by **David Ayer**

Q181. 2024 Charter ...

Uploaded on **4/25/2025**
by **David Ayer**

2024_Steve Griffin C...

Uploaded on **4/25/2025**
by **David Ayer**

Jessica Kelly

Comments :

The resumes are consistent with the charts provided earlier.

Q182.**Attach Appendix I For Each Board Member**

1. Charter School Board Member Background Certification Statement and
2. 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.**

Upload Required **File Type:** pdf, image, excel, word, text **Max File Size:** 40

Total Files Count: 50

Resources

2024 Charter School ...

Applicant Evidence :

Katie_Brown 2024 C...	Katie_Brown_382093...	Sara_Suchman_3820...	2024 Charter School ...
Uploaded on **4/25/2025** by **David Ayer**	Uploaded on **4/25/2025** by **David Ayer**	Uploaded on **4/25/2025** by **David Ayer**	Uploaded on **4/25/2025** by **David Ayer**
Sara Suchman - Boar...	Candace_Fletcher_38...	Stephen_Griffin_382...	Carol_Pirrello_38221...
Uploaded on **4/25/2025** by **David Ayer**	Uploaded on **4/25/2025** by **David Ayer**	Uploaded on **4/25/2025** by **David Ayer**	Uploaded on **4/25/2025** by **David Ayer**
2024_Charter_School...	Candace Fletcher - 2...		
Uploaded on **4/25/2025** by **David Ayer**	Uploaded on **4/25/2025** by **David Ayer**		

Q183.**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.

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

Total Files Count: 3

Applicant Evidence :

Encompass Montess...
Uploaded on **4/25/2025** by **David Ayer**

Q184.**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, text **Max File Size:** 30

Total Files Count: 5

Applicant Evidence :

Encompass Montess...

Uploaded on **4/25/2025**
by **David Ayer**

11.3. Staffing Plans, Hiring, and Management

Q185.**Projected Staff** Complete the staffing chart below outlining your staffing projections. Adjust or add functions and titles as needed to reflect variations in school models. Be mindful that your predicted administration and staff match the projected enrollment noted in Section I, course offerings, and align with the proposed budget.

Upload Required **File Type:** excel **Max File Size:** 30 **Total Files Count:** 10

Resources

Staffing Chart Templ...

Applicant Evidence :

Q185. Staffing Chart ...

Uploaded on **4/25/2025**
by **David Ayer**

Q185. Staffing Chart ...

Uploaded on **4/25/2025**
by **Candace Fletcher**

Q186.**Staffing Plans, Hiring, and Management** Explain the board's strategy for recruiting and retaining high-performing teachers.

Recruitment:

Encompass will follow state charter school regulations for the percentage of teachers who must be state licensed at elementary and middle school levels (currently 75% and 50%, respectively). 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 NCMPS's relationships and networks in the public Montessori community 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. We will support these teachers in earning their Montessori credential through onsite training cohorts using a Montessori Teacher Residency model. The Montessori Teacher Residency (MTR) model was developed by NCMPS who currently runs training programs in 8 states and supports affiliated programs in 4 more locations, with new MTRs opening around the country nearly every year. sl fMACTE-accredited for teacher preparation. the MTR approach and curriculum is specifically designed to prepare Montessori teachers for public schools and support members of the school community in their professional development to full Montessori certification.

3) Supporting a career path for classroom assistants: Wherever possible, we will support classroom 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 is going to be a fabulous place to work 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.

Jessica Kelly

Comments :

The recruitment strategy strengths are Montessori-specific and there are plans to recruit licenesed teachers and support them through Montessori training which demonstrates long-term investement and adaptability. The inclusion of a career ladder for assistant promotes internal talent development and community-rooted staffing. The applicant should add numbers and timelines to clarify how many teachers will be needed, and when recruitment efforts begin. The applicant should explain how salary benchmarks will be determined and up-dated. There should be strategies included for diverse and inclusive recruitment to strengthen both mission alignment and legal compliance.

Q187. **If already identified, describe the principal/head of school candidate and explain why this individual is well-qualified to lead the proposed school in achieving its mission. Provide specific evidence that demonstrates the capacity to design, launch, and manage a high-performing charter school. If the proposed leader has never run a school, describe any leadership training programs that (s)he has completed or is currently participating in. If no candidate has been identified, provide the job description or qualifications, and discuss the timeline, criteria, and recruiting/selection process for hiring the school leader.**

Encompass' candidate for the principal role is Candace Fletcher, a lifelong Montessori educator with extensive experience in public Montessori, early childhood education, and youth development. Candace's instructional leadership is marked by her success as Regional Manager in a network of public Montessori charter schools, where she demonstrated a clear capacity to design, launch, and manage a high-performing educational program. During this time, she led a team in establishing a pre-K - 6 learning center while also teaching a multi-age lower elementary class. Under her leadership, the learning center achieved yearly enrollment targets and experienced significant growth, with enrollment increasing by 30% within three years.

Candace played a crucial role in collaborating with families and the school's leadership team to secure a first-of-its-kind charter, demonstrating her ability to navigate the complexities of charter school development and ensure the school's viability.

Candace's influence extends beyond the school level through her work as Practicum Coordinator, Instructor & Coach at the National Center for Montessori in the Public Sector, where she provides training and support to Montessori teachers and schools nationwide. This experience showcases her leadership in the broader Montessori community and her commitment to advancing the method in the public sector.

Complementing her practical experience, Candace has strengthened her leadership skills through programs such as LeaderPREP and Servant Leadership training, further preparing her to effectively lead the proposed school.

Jessica Kelly

Comments :

The candidate bring a deep background in public Montessori education, which aligns directly with the school's mission. The applicant could provide examples of academic results, staff retention, or family satisfaction from schools she led. Also address any contigency plans if she is unable to serve and restate how her training programs have addressed gaps in full school management experience.

Q188. **If the school leader has been identified, attach the school leader's one-page resume as Appendix O.**

Upload Required **File Type:** pdf, excel, word, text **Max File Size:** 30 **Total Files Count:** 5

Applicant Evidence :

C Fletcher Resume - ...

Uploaded on **4/23/2025**
by **Candace Fletcher**

Q189.**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 annually using the Executive Assessment Suite from 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

Jessica Kelly

Comments :

There is a clear chain of command and comprehensive evaluation system with multi-faceted evaluation components. There is an alignment with Montessori principles and the annual cycle provides continuity. There is not discussion of broader employee-board relationships; focuses on Executive Director. The applicant could expand the response on board supports and staff oversight.

Q190. **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 By-Laws. 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 coaches 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.

Jessica Kelly

Comments :

The response clearly outlines that the board only hires and dismisses the Executive Director. There is alignment with legal requirements for hiring and background check processes and well-structured hiring process for staff. There is limited detail on the hiring and dismissal process of the executive director.

Q191. **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/resources/fy25webschedulesupdated7-12-24pdf/download?attachment (https://www.dpi.nc.gov/documents/fbs/resources/fy25webschedulesupdated7-12-24pdf/download?attachment)

Benefits will be provided by the NC State Employees Pension.

Health Care will be provided by a private broker.

Jessica Kelly

Comments :

The outline provided is links to DP docs. The applicant should elaborate further on the health care provider.

Q192. **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.

Jessica Kelly

Comments :

There is a clear chain of responsibility for termination and legal compliance is noted. The inclusion of action plans prior to termination indicates a tiered, supportive approach to performance management rather than an immediate punitive model. More specifics on the grievance process could be included. The employee handbook should be finalized prior to staff hiring and reviewed annually.

Q193. **Identify any positions that will have dual responsibilities and the funding source for each position.**

Not applicable

Q194. **Describe the plans to have qualified staffing adequate for the anticipated special needs population and means for providing qualified staffing for EL and gifted students.**

Encompass has budgeted for a full-time Exceptional Children teacher starting in Year 1. In Year 2, this number will go up to 2FTE and continue to grow through hiring staff or contracting with outside providers to meet the need. We bring a counselor on in Year 2, and a Health Aid on in Year 3. 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 ML 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.

Jessica Kelly

Comments :

The applicant outlines the plans for qualified staffing for special needs populations for years 1-3.

Q195. **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

Executive Director	- Master's in Education, Business or related field - 3–5 years leadership experience -Charter School experience Or 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

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

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

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 Assistant Teachers	- 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 (Stipend)	- Bachelor's degree in subject area - NC Teaching License or eligibility	- Montessori certification from MACTE-accredited program - Montessori Public School Experience - Experience mentoring/ coaching	- 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

Jessica Kelly

Comments :

The introductory narrative is mission-aligned, well-written, and thoughtful, emphasizing Montessori values, legal compliance, and staff development. The applicant could include a brief section explaining how candidates are vetted, how hiring decisions are made and how cultural/mission fit is evaluated.

11.4. Staff Evaluations and Professional Development

Q196. Identify the positions responsible for maintaining teacher license requirements and professional development.

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.

Jessica Kelly

Comments :

There are clear role assignments and alignment with organizational structure. There is an emphasis on professional development culture and recognition of peer leadership. There is a lack of clarity around license tracking process and the assistant principal and instructional coach descriptions are vague. Some suggestions are to use definitive language to clarify the responsibilities of each role. Include how licensure will be monitored and documented and mention the executive director's role in ensuring overall compliance and reporting to the board. Describing how the leadership team will collaborate on both tracking licensure and developing aligned professional development plans.

Q197. **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 all instructional staff meet the licensure and certification requirements established by the North Carolina Department of Public Instruction (NCDPI). All 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.

The proposed staffing model includes:

- Lead Montessori teachers
- Classroom Assistants (1 per classroom)
- Executive Director
- Principal
- Assistant Principal
- Montessori Instructional Coaches trained in the NCMPS coaching model
- Exceptional Children Teacher
- Social Worker / Counselor

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, and the management fee

includes additional educational training and development supports.

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: Coaches work 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 coaches 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.

Jessica Kelly

Comments :

There is a strong alignment with Montessori Philosophy and there is a clear licensing and compliance plan. There is a multiple tools for evaluation and reflection along with a comprehensive coaching and mentorship plan. To strengthen response the applicant could include budget estimates and define how the school will track and report on licensure compliance.

Q198. **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, 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 complete the Montessori Teacher Residency (MTR) 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 Classroom Assistants
◦ Classroom 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.

Jessica Kelly

Comments :

The plan is well-structured and multi-tiered providing a comprehensive PD framework with tiers. The differentiated approach respects the development stage of each staff member and supports equity in adult learning. There is also an emphasis on continuous improvement with the creation of the Teacher Growth Plan. The plan does not specify how often PD sessions occur and the budget alignment is not explicit. The applicant should define roles and responsibilities for PD oversight and accountability.

Q199. **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.

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

Jessica Kelly

Comments :

The PD schedule is very detailed and structured with strong alignment to Montessori philosophy. There is a focus on team culture and collaboration with emphasis on reflective and individualized practice. There is no mention of follow-up or ongoing support.

Q200. **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.

1. **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.

1. **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.

1. **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 Montessori coaches 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.

Jessica Kelly

Comments :

The applicant provides a detailed narrative of the timeline of PD.

11.5. Marketing, Recruitment, and Enrollment

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.

Q201.**Marketing Plan** Marketing to potential students and parents is vital to the survival of a charter school. Provide a plan indicating how the school will market to potential students and parents in order to reasonably reflect the racial/ethnic and demographic composition of the district in which the charter school will be located or of the special population the school seeks to serve: (G.S.115C-218.45(e)).

Our work in reaching out to families in Wake County has already begun. We launched encompassmontessori.org just a few weeks ago, 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 begin over the summer, alongside regular website updates with an Encompass Montessori vlog that will feature our Executive Director. Establishing an online presence where families can get to know our ED, the Montessori philosophy, and begin establishing connections will support us in developing a community.

Community and relationship-based marketing are the most effective forms of marketing, in order to establish brand 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.

We will launch social media channels to meet parents where they are, so we can amplify the content we create with the vlog and create a forum to share best Montessori practices that can be practiced at school and at home will 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 reach- outs to families in historic 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 in the Summer of 2025, 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.

Jessica Kelly

Comments :

The applicant acknowledges legal requirement and a multi-platform marketing strategy. There is an emphasis on relationship-building and trust as foundational principles with plans for listening sessions and direct community engagement. There is a lack of demographic data and goals could be established to demonstrate how enrollment will reflect the community.

Q202. **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 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.

Jessica Kelly

Comments :

A plan is in place to inform parents and community members about the school. The applicant could include a timeline to strengthen their response.

Q203. **Describe your plan to recruit students during the planning year, including the strategies, activities, events, and responsible parties. Include a timeline and plan for student recruitment/engagement and enrollment, with benchmarks that will indicate and demonstrate suitable recruitment and enrollment practices over time.**

We will have a booth at the farmer's market, attend local community events like the Spring Fling and the Latin American Festival, and the August Arts & Educational Festival, to call out a few options. We've already subscribed to the "Knightdale Knewsletter" to keep current with all the community happenings.

Below is the Marketing and Start-up Timeline, which highlights ongoing community efforts alongside specific targets.

Epic Change Education will be responsible for providing a refined marketing plan based on this approach, and the ED and Board Members will be executing the community building and enrollment events during the planning year.

By December of 2026, we anticipate at least 1k subscribers/followers/likes on our Encompass Montessori vlog channel, and at least 75 people on our email newsletter list. In January and February of 2027, our goal is to receive 250 applications from Kindergarten and 1st grade students to pull our Lottery in March of 2027 for a totalstudent enrollment of 144.

The work to achieve these goals has already begun. As enrollment marketing professionals, ECE and its partners will test and evaluate each one of the online and on ground initiatives against KPI's of CPE (Cost per Enrollment), Demographic breakdowns, and Lead Generation Metrics to ensure our pipeline of interested parents grows to a level that will result in achieving the above stated goals. These particular KPIs were chosen to ensure the school's commitment to serving underserved populations and to reflect the community it serves. If metrics in 2025 and early 2026 do not align, we will pivot our marketing mix to increase exposure in our desired communities.

Jessica Kelly

Comments :

There is clear and measurable enrollment benchmarks that provide specific numbers. The recruitment strategy is thoughtful and community based. The applicant could include a month-by-month timeline and expand on equity-focused outreach.

Q204. **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 are not thriving 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.

Jessica Kelly

Comments :

The applicant should elaborate on plans for outreach to families in poverty, academically low-achieving students, English learners and other students at-risk of academic failure. There is a vague description on students with disabilities and beyond providing materials in Spanish there is little detail in the response.

Q205. **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, churches, Chamber of Commerce, preschools, and local realtors will give us a wide swath of supporters. We will also develop 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.

Jessica Kelly

Comments :

The applicant lists specific community organizations they will approach; does the applicant have a contingency plan if the partnerships are not successful?

11.6. Parent and Community Involvement

Q206. **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 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.

Jessica Kelly

Comments :

There is a multi-channel communication strategy that includes diverse communication tools. The use of Parentsquare will allow for two-way communication. The plan highlights relationship-building activities. The applicant should consider including how communication will be made accessible and inclusive and describe how family feedback will be gathered and incorporated into decision-making.

Q207. Describe how you will engage parents in the life of the public charter school. Explain the plan for building engaging partnerships between the family and school that strengthen support for student learning.

Strong connections between childrens' 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.

Jessica Kelly

Comments :

There is a clear commitment to family engagement and opportunities for staff voice. There is a desire to create a school that values and empowers families. There could be specific examples of family engagement events. A connection between student learning and family engagement would strengthen the response.

Q208. 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 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

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.

Jessica Kelly

Comments :

There is a strong alignment with mission and Montessori philopsophy with comprehensive and thoughtful programming. There is an emphasis on parent education as well as inclusive, relationship-building focus. There could be feedback systems put into place to track effectiveness and clarifying language accessibility would strengthen the response.

11.7. Admissions Policy

Q209.**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

Jessica Kelly

Comments :

The applicant plans to implement a weighted lottery.

Q210. 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.

Jessica Kelly

Comments :

The weighted lottery will focus on economically disadvantaged students.

Q211. 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).

Jessica Kelly

Comments :

The applicant indicates how it will identify economically disadvantaged students but does not indicate a percentage or amount that will be considered weighted.

Q212.3) 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); Lill ard 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.

Jessica Kelly

Comments :

The applicant references research to support their weighted lottery.

Q213.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

These recruitment activities are designed to orient prospective students and families to Enompass's mission and vision, share information about Montessori education, and promote understanding of the lottery and enrollment process, including important deadlines.

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. 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. 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.

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.

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

Jessica Kelly

Comments :

The applicant has provided a detailed response and included proposed policies.

11.8. Certify

Q214. **This subsection is entirely original and has not been copied, pasted, or otherwise reproduced from any other application.**

- (●) Yes
- ( ) No

Q215. **Explanation (optional):**

Section

Jessica Kelly

Ratings

Meets the Standard	The response meets the criteria in some aspects, but lacks sufficient detail and/or requires additional information in one or more areas.

Comments :

The applicant meets the standard in governance and capacity rating. There is alignment between responses for each component. There is minor detail that could be added to strengthen the responses.

12. Operations

12.1. Transportation Plan

Q216. 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., churches, nonprofits) for support or shuttle services.
- **Public Transit Evaluation**: We will assess local public transit options and share access guidance with families.

Phase 2 – Years 2–3: 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 School Operations Manager will manage vendor relationships, contracts, routes, safety procedures, and compliance reviews.
- **In-House System Oversight**: The Operations Manager will oversee all transportation staff, vehicle maintenance, and safety operations.

- **Leadership Accountability**: The School Leader 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.

Jessica Kelly

Comments :

The plan clearly reinforces the school's mission of equitable access, ensuring that no student is denied enrollment due to transportation barriers. There is a three phase model for transportation and aligns with enrollment growth and budget expansion. There is detailed oversight on roles specific to transportation and includes provisions for students with special needs. The applicant should consider coming up with a system to assess transportation effectiveness.

12.2. School Lunch Plan

Q217.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.

Jessica Kelly

Comments :

There is clear intent to participate in the National School Lunch Program and the plan demonstrates awareness of the compliance required. A specific operational structure would strengthen teh response as well as the budget alignment and a backup strategy.

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**

Q218.**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 :

NC Charter App Ins Te...	NC Charter School Pr...
Uploaded on **4/25/2025** by **Candace Fletcher**	Uploaded on **4/25/2025** by **Candace Fletcher**

Jessica Kelly

Comments :

Evidence provided.

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.

Q220.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

12.5. Start-Up Plan

Q221.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 attached chart to highlight the dual-tracks of launching the school and the facility. The chart depicts a ground-up build. This build will be done in phases, and is discussed in more detail on the Facilities plan.

We have already begun on-ground work connecting with our proposed community through our Board Member's connections in education and in their personal and business relationships. We are excited to dig in more specifically to ensure our location will be closest to the families who are most underserved by a Montessori location. NCMPS has plotted the nearest public Montessori options at over 45 minutes away.

We will hire our Executive Director (ED) this summer (2025), to begin in earnest our community development work. Board Members have also begun working together in completing this application and will ensure all policies and procedures are established alongside the ED and Epic Change Education to create a seamless Start-up process.

The ED will focus on staffing and work with ECE to streamline processes and to "divide-and-conquer" tasks, alongside the Board of Directors members. The business office tasks reside in ECE's domain, and the staffing is in the ED's domain. Recruitment, marketing and enrollment will begin with an immediate program of Community Development, which will be executed by the ED with the input and support of the BOD and ECE.

Jessica Kelly

Comments :

The plan identifies specific stakeholder and provides a basic division of responsibilities. The response emphasizes pre-charter community engagement showing alignment with the school's mission of serving underserved families. A list of detailed start-up tasks would strengthen the response and a risk management section addressing potential delays in facility completion, enrollment shortfalls, or staffing challenges.

Q222.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 can be a challenge, because it can easily be forgotten if it is not prioritized and held as a core value of a school. In the run-up to opening day, the task list can grow large and heading to the town barbecue event may not seem like a priority, unless we establish from the very beginning that community is a core value of ours and we make time for both barbecues and more serious community listening sessions. 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 board members or a management organization that is 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 has advanced through the final round with New Schools Venture Fund and expect to be awarded a $250K grant over the summer, and we have engaged with Great Schools North Carolina in developing our plan for opening, and they are interested in supporting our school for a 2027 opening with additional funds and support.

Epic Change Education, our non-profit CMO, utilizes Building Hope Services back office systems. They are also a non-profit and dedicated to providing the resources schools most need at below-market rates. Setting up our back office with the most efficient and cost-effective methods and partners keeps us focused on putting more dollars into the classrooms and less on the business operations. Epic Change's rates are also lower than traditional CMO's because it is a School Development and Service organization whose mission is directly aligned with our school's growth and stability, both financially and educationally.

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 look for ways to be more efficient, effective, transparent, and safe with our finances.

Our board and Epic Change Education agree 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 Association of 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 to which all public Montessori schools seek to uphold.

Our board members from NCMPS, and their 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 Montessori teaching. Supported by our NCMPS board and additional resources, 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 in quiet ways by sharing our intention to serve the families of Wake county with a public Montessori school, and our NCMPS board members have begun reaching out to leaders they have known for years who embody the type of servant leadership we most need.

Jessica Kelly

Comments :

The experienced leadership has started schools and opened facilitites. The applicant outlined three major categories of potential challenging including community engagement, financial stability, and recruiting and retaining high-quality educators. The metrics for tracking the success of community engagemetn, staffing and financial rollout.

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.

Q223.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, working directly with ECE, will create an agreement to identify, develop, and build a ground-up school or renovation for Encompass Montessori to call home. We 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.

Applicant Evidence :

Screenshot 2025-04-2...	Screenshot 2025-04-2...
Uploaded on **4/25/2025** by **Candace Fletcher**	Uploaded on **4/25/2025** by **Candace Fletcher**

Jessica Kelly

Comments :

The applicant provided a timeline on how facilities will be obtained.

Q224.**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 2027, 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. As we go through the process, and at key benchmarks, the BOD will assess whether to secure a temporary facility. It is too early to secure a temporary location for August of 2027. However, with a total of 144 students in Year One, we are confident a suitable temporary space will be located that can meet all fire, safety, and health guidelines necessary to receive a Certificate of Occupancy by July of 2027.

Jessica Kelly

Comments :

The applicant has a short and long term plan for facilities.

Q225.**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 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 & 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 43,503, which is 95 GSF/Child for a total eventual student body of 864. At 73 NSF/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.

Jessica Kelly

Comments :

There are Montessori-specific facility justifications and the description aligns tightly with this model; many of the spaces will be multi-purpose as well. Expanding the budget aspect would strengthen this response.

Q226.**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. (https://www.dpi.nc.gov/documents/schoolplanning/school-costs-project/download)

Kempczinksi, "At a quarter-billion dollars, Durhan school's price tag dwarfs its peers.

The 9th Street Journal. Accessed August 22,2024. (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. Building a K-8 tends to skew a little higher than a K-5 and lower than a High School. We will also be seeking renovation spaces, alongside land to build ground-up facilities, and then will be conducting price comparisons to ensure our facilities costs are in line with our budgetary restrictions.

Clark, Phil, "[2024 Update] Commercial Construction Cost Per Square Foot In The Us", Claris Design Build. Accessed 4.23.2025. (https://www.clarisdesignbuild.com/2024-update-commercial-construction-cost-per-square-foot-in-the-us/)

Jessica Kelly

Comments :

Approximate budget impact is included along with resources the information was pulled from.

Q227.**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 2027, we will seek to build or renovate suitable facilities first, and we 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, 2026, 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 ECE will continue 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 2025 or early 2026 for a ground-up build affords us enough time to construct the school prior to opening in August 2027. If a temporary facility is needed due to unforeseen construction delays, no school programming will be impacted, because we are launching with Kindergarten and first grade only and their needs are manageable within the context of multiple types of spaces, from churches to strip malls to 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. 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.

Jessica Kelly

Comments :

There is a strong continjency plan in place.

Q228.**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. By partnering with Epic Change Education, who has significant experiences and connections in both facilities and financing facilities, we are confident the process will be smooth and handled with efficiency and effectiveness.

The ECE CMO has extensive experience in charter school builds, starting with the CEO's management of the ground-up builds of a Montessori Preschool and K-8, as well as serving as Owner's Rep, Project Manager, and in other various capacities as a consultant and with Building Hope Real Estate on over 10 charter school build projects. She will work directly with a designated Board Member to ensure the project meets the educational and financial needs of the school, is delivered on-time and on-budget, and if there are any unforeseen delays, a suitable temporary location will be secured.

Jessica Kelly

Comments :

The experience of the board will be beneficial for faciliteis acquisition.

12.7. Certify

Q229.**I certify that this subsection is entirely original and has not been copied, pasted, or otherwise reproduced from any other application.**

- (●) Yes
- ( ) No

Q230.**Explanation (optional):**

Section

Jessica Kelly

Ratings

Meets the Standard

The response meets the criteria in some aspects, but lacks sufficient detail and/or requires additional information in one or more areas.

Comments :

The applicant has solid plans in place for transportation, school lunch, start-up plan, and facilities. The applicant can provide further detail on contingency plans for each of those categories.

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.

Q230.**If applicable, attach as Appendix M: Revenue Assurances.** Assurances are needed to confirm the commitment of any additional sources of revenue.

Applicant Evidence :

Encompass Montesso...

Uploaded on **5/28/2025**
by **Candace Fletcher**

Jessica Kelly

Comments :

Revenue assurance attached.

Q231.**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/2025-nc-charter-application-budget-template/download?attachment) "Please be advised that Google Sheets is not supported for use with the NC charter budget template. Additionally, 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 :

Encompass Budget.FI...

Uploaded on **5/28/2025**
by **Candace Fletcher**

13.2. Budget Narrative

Please include additional information that explains the assumptions used in the 5-year budget.

Q233.**How was the student enrollment number projected?**

The student enrollment number was projected based on the current demand for charter school enrollment in Wake County.

Q234.**Provide an explanation as to why you believe there is a demand for the school that will meet this enrollment projection.**

Data at the state level for charter schools makes a strong case for charter school demand.

Enrollment in charter schools in North Carolina increased 10% over the last year, according to the latest Charter School Annual report to the legislature. According to the report, 169 of the 210 charter schools in NC have waitlists, totaling more than 85,000 students. That is an increase of 8000 students (9.4%). In addition, the enrollment of students in charter schools increased by 10%, now serving over 145,000
students. Nearly 1 in 5 charter schools (37) have a waitlist of 700 students or more. Nearly 40% (83) had a waitlist of 200 or more students. Additionally, from 2019 to 2022 charter school enrollment increased 19% -- this is the fifth highest increase in enrollment in the nation.

The trend for the desire for communities to have educational options in the charter school space is positive and upward. We believe this to be the case at the county level as well. Wake County Public Schools faces a challenge with school overcrowding and as stated before earlier in our application, 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. A local, publicly-funded Montessori program will now be an option for folks, this unique option will not only recognize the demand but also provide the educational choice that families desire.

Sources:
https://www.dpi.nc.gov/2023-charter-schools-annual-report-0/open
https://www.ednc.org/05-15-2024-new-charter-school-report-shows-growing-student-waitlist-in-north-
carolina/
#:~:text=During%20the%202023%2D24%20school,demand%20for%20charter%20school%20enrollment.

Jessica Kelly

Comments :

The applicant has included a source to validate their response for demand of the school.

Q235.**Provide the break-even point of student enrollment.**

The break even point on student enrollment is 137 for year 1.

Q236.**Discuss the school's contingency plan to meet financial needs if anticipated revenues are not received or are lower than estimated.**

Reduce spending on personnel first, other resources second. Since there would be fewer students, fewer people and materials would be needed, lowering cost. In addition, we have the opportunity to go to our management organization to get some relief if needed.

Jessica Kelly

Comments :

There seems to be a gap in the Year 1 budget in regards to lunch program and transportation.

Q237. **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.**

We have the New Schools grant for $250,000 included in year one of the budget. As you can see in the proposed budget, once we are past year one we will be independently financially sustainable. We will also be applying for the Great Schools North Carolina grant to support Year One expenditures.

Q238. **Provide the student to teacher ratio that the budget is built on.**

The budget is built on a 24:1 actual teacher to student ratio. In a Montessori school, each classroom has an Instructional Assistant, which would change the ratio to 14.4:1

Q239. Describe the board's individual and collective qualifications and capacity for implementing the financial plan successfully.

The Founding board has multiple areas of expertise. Steve Griffin has been working with charter schools in NC for over 20 years and has 40 years experience in the business of insurance. Carol Pirrello has over 25 years experience working in nonprofits as a supervisor and employee. She understands how to operate in an organization designed to serve the community with limited resources.

Jessica Kelly

Comments :

Q240. 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.

Q241. 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.

These services will be provided through the management organization. Currently they are charging 12% of the gross revenue, which is significantly less than most charter school management organizations.

The board will oversee the CMO with monthly meetings to ensure fidelity and compliance. Annually, there will be a performance review as well.

Q242. 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.

All the services described, except EC instructional support, would be provided by the management organization. EC support would be provided by the EC teacher and the two administrators.

Jessica Kelly

Comments :

Several key positions are missing from Year 1 including custodial, lunch, and transportation.

Q243.**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 IA 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.

Curricular offerings: As a K-8 school starting out in K-1 the curriculum is focused on those early years. Montessori materials will reflect both age groups and are designed to work with materials designed for future ages.

Transportation: In the initial years, parents will be relied upon for student transportation. In the future years, utilizing local public transportation will be the next step. The initial Executive Director sat on a municipal transit authority for 6 years and understands how funding works with public transportation. Eventually in-house transportation may be provided, pending appropriate funding.

Facilities: In Year One, the school would rent a small appropriate facility or have a deferred rent on our school facility that will accommodate our small opening number of students. A phase build will be considered as well. Deferred rent agreements are common, and a sample LOI Lease Agreement is in the Appendix to illustrate how we would eventually own the leased property.

Jessica Kelly

Comments :

With parents being responsible for transportation in year 1 will the target population be met since that is a key component?

Q244.**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 1.

Q245.**Provide a description of proposed financing structure. Include financing of facilities,**

other asset financing, and leases.

A lease/purchase arrangement with Epic Change Education, or its assigns, will be structured for the school to be able to well-afford its lease payments, as outlined in the Lease LOI in Appendix A4.2 Facility Buyout Agreement. If needed, the initial base rent will be deferred until such time the school can repay the deferred rent. The lease/purchase agreement is intended to provide the school a pathway to ownership that does not require a balloon payment or other significant investments beyond the lease payments.

Q246. 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.

Jessica Kelly

Comments :

Further detail on what will be needed, estimated costs and budget impacts are imperative.

13.3. Financial Compliance

Q247. How will the school ensure adequate internal controls, including segregation of duties, safeguarding of assets, accurate and adequate record keeping?

The management organization will provide financial and accounting services. An independent audit will be performed annually.

Q248. Provide any known or possible related party transactions (relationship, description of transaction, and estimated dollars involved).

None.

Q249. 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

Petway Mills

804 N Arendell Ave

Zebulon, NC 27597

Reekah Barr

2505 - B Nash Street

Wilson, NC 27896

13.4. Certify

Q249.I certify that this subsection is entirely original and has not been copied, pasted, or otherwise reproduced from any other application.

- (●) Yes
- ( ) No

Q250.Explanation (optional):

N/A

Section

Jessica Kelly

Ratings

Does Not Meet the Standard	**The response is significantly incomplete; demonstrates lack of preparation; is not aligned to the mission and vision of the district or otherwise raises significant concerns about the viability of the plan or the applicant's ability to carry it out.**

Comments :

The responses for the financial plan lack detail and are not fully aligned with responses earlier in the application.

14. Other Forms

Q252.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: **2**

Resources

2025 Charter School ...

Applicant Evidence :

Q252. 2025 Charter S...

Uploaded on **4/25/2025**
by **Candace Fletcher**

Section

Jessica Kelly

Ratings

Meets the Standard

The response meets the criteria in some aspects, but lacks sufficient detail and/or requires additional information in one or more areas.

15. Third-party Application Preparation

Q253. Was this application prepared with the assistance of a third-party person or group?

- (●) Yes
- ( ) No

Q254. Give the name of the third-party person or group:

National Center for Montessori in the Public Sector

Epic Change Education

Q255. Fees provided to the third-party person or group:

No fees were provided to the third-person groups. $0.

Section

Jessica Kelly

Ratings

Meets the Standard

The response meets the criteria in some aspects, but lacks sufficient detail and/or requires additional information in one or more areas.

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 26, 2024, at 5:00 pm EDT for Fast Track and Accelerated applications, and April 26, 2024, 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.

Q256.*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, 2024, at 5:00 pm EDT.**

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

☑ I understand

Resources

2025 Payment Form.pdf

Section

Jessica Kelly

Ratings

Meets the Standard	**The response meets the criteria in some aspects, but lacks sufficient detail and/or requires additional information in one or more areas.**

17. Signature page

Q257.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: 1**

Resources

Signature Page.docx

Applicant Evidence :

Q257 Signature Page....

Uploaded on **4/25/2025**
by **Candace Fletcher**

Q258.Board chair, please digitally sign your application here.

Signature

Section

Jessica Kelly

Ratings

Meets the Standard

The response meets the criteria in some aspects, but lacks sufficient detail and/or requires additional information in one or more areas.

Final Status

○ Reject ○ Approve

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 Carolia, 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 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. **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. **REMUNERATION.** The Board may adopt a resolution which results in directors being paid a reasonable compensation for their services rendered as directors of the Corporation, *provided* the compensation is less than the operating costs of the Corporation. Directors may also be paid a fixed sum and expenses, if any, for attendance at each regular or special meeting of such Board. Nothing contained in these Bylaws precludes a director from receiving compensation for serving the Corporation in any other capacity, including any services rendered as an officer, employee, or third party service provider. If the Board accordingly passes a resolution related to committees of the Board, then committee members may be allowed like compensation for attending committee meetings. At any time, a resolution of the Board that grants compensation to a director may be challenged by another director, provided the challenging director requests a special Board meeting specifically addressing the resolution related to director compensation.

Any director who votes for a resolution related to director compensation may be held liable under Section 2.03 of these Bylaws if the resolved director compensation is unreasonably excessive, violates any section of Article 2 of these Bylaws, or unreasonably jeopardizes the nonprofit or tax-exempt status of the Corporation.

2.19. **LOANS.** No loans may be made by the Corporation to any director.

2.20. **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.

2.21. **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 a President, a Secretary, and a Treasurer, who will be elected by the Board. The Corporation may also have one or more Vice-Presidents (one shall serve as Executive Vice-President) and Assistant Secretaries and Assistant Treasurers as the Board may designate. 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, Vice-President (if any), 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. **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.

7.03. **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.

7.04. **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.

7.05. **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.

7.06. **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.

7.07. **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 ____day of _____, 20____.

_____
Director

_____
Director

_____
Director

[Place Corporate Seal Here, if applicable]

Instructions for Completing Articles of Incorporation

Nonprofit Corporation

(Form N-01)

Item 1 Enter the complete and accurate corporate name for the nonprofit corporation. The name may include a corporate ending.

Item 2 Charitable or religious corporation" means any corporation that is exempt under section 501(c)(3) of the Internal Revenue Code of 1986 or any successor section, or that it is organized exclusively for one or more of the purposes specified in section 501(c)(3) of the Internal Revenue Code of 1986 or any successor section and that upon dissolution shall distribute its assets to a charitable or religious corporation, the United States, a state or an entity that is exempt under section 501(c)(3) of the Internal Revenue Code of 1986 or any successor section. Place a checkmark in item 2 if the proposed nonprofit corporation intends to seek exemption under Section 501(c)(3) of the Internal Revenue Code.

Item 3 Enter the name of the initial registered agent. The registered agent must be either an individual who resides in North Carolina; a domestic business corporation, nonprofit corporation, or limited liability company whose business office is identical with the registered office; or a foreign corporation, nonprofit corporation or limited liability company authorized to transact business in North Carolina whose business office is identical with the registered office.

Item 4 Enter the complete street address of the registered agent's office located in North Carolina and the county in which it is located. Enter the complete mailing address of the registered office only if mail is not delivered to the street address stated in Item 5 or if you prefer to receive mail at a P. O. Box or Drawer.

Item 5 Enter the name and business address of each incorporator.

Item 6 Indicate by checking either (a) or (b) if the nonprofit entity will or will not have members.

Item 7 **Attach the provisions for the nonprofit regarding the distribution of assets upon dissolution. Form N-14 has sample provisions for your use as a guide.**

Item 8 Other provisions may address the purpose of the corporation, the limitation of liability, etc. per statutes in Chapter 55 of the North Carolina General Statutes.

Item 9 Enter the principal office telephone number and the complete street address of the principal office and the county in which it is located. If mail is not delivered to the street address of the principal office or if you prefer to receive mail at a P.O. Box or Drawer, enter the complete mailing address of the principal office.

Item 10 **(Optional):** This field is being provided in order to assist business entities in identifying its company officials and complying with Federal banking regulations.

Item 11 **(Optional):** The Department offers a free voluntary notification system for which you may choose to participate. If you would like to receive this free service, please provide a business e-mail address in the space provided. Your participation will not result in your e-mail address being viewable on our website. Participation will help us to prevent identity theft in the event an unauthorized person submits a fraudulent document for filing in the name of the business entity.

Item 12 The document will be effective on the date and at the time of filing, unless a delayed date or an effective time (on the day of filing) is specified. If a delayed effective date is specified without a time, the document will be effective at 11:59:59 p.m. on the day specified. If a delayed effective date is specified with a time, the document will be effective on the day and time so specified. A delayed effective date may be specified up to and including the 90th day after the day of filing.

Date and Execution

Enter the date the document was executed.

In the blanks provided enter:

- The name of the entity executing the Articles of Incorporation; if an individual, leave blank.
- The signature of the incorporator or representative of the incorporating entity.
- The name of the incorporator or name and title of the above signed representative

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
Sara Suchman	4030 Wake Forest Road STE 349 Raleigh NC 27609

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 Raleig NC 27609	President
Sara Suchman	4030 Wake Forest Road STE 349 Raleig NC 27609	Vice President
Carol Pirrello	4030 Wake Forest Road STE 349 Raleig NC 27609	Secretary
Katie Brown	4030 Wake Forest Road STE 349 Raleig NC 27609	Treasurer

11. **(Optional):** Please provide a business e-mail address: encompassmontessori@gmail.com.
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.

MANAGEMENT AGREEMENT

THIS MANAGEMENT AGREEMENT ("Agreement") is made and entered into as of the 24th day of April, 2025, by and between Epic Change Education, Inc., ("ECE"), a Florida nonprofit corporation, and Encompass Montessori Charter, a North Carolina nonprofit corporation (the "Charter School").

RECITALS

WHEREAS, the Charter School has submitted a charter application for the operation of a Charter School to the North Carolina Charter School Review Board (the "Authorizer") to operate Encompass Montessori Charter (the "Charter Application"); and

WHEREAS, once the Charter Application is approved, the Charter School and the Authorizer will enter into a Charter Agreement, which shall be attached hereto and made a part hereof; and

WHEREAS, the Charter School has determined that it is in its best interest to contract with a qualified and competent educational service provider to operate the Charter School; and

WHEREAS, ECE is a nonprofit charter management organization (“CMO”), that provides services including the management, staffing, and operation, of public charter schools for non-profit boards; and

WHEREAS, the Charter School wishes to engage ECE, and ECE wishes to be engaged by the Charter School to manage and operate the Charter School upon the terms and conditions set forth herein; and

NOW, THEREFORE, for mutual and valuable consideration, the receipt and adequacy of which is hereby acknowledged, the parties agree with each other as follows:

ARTICLE 1.
CONTRACTING RELATIONSHIP

1.1. Authority. The Charter School represents that it is authorized by law to contract with ECE and for ECE to provide educational management services to the Charter School. The Charter School further represents that it expects the Charter Application will be approved by the Authorizer to organize and operate a public charter school and that once the Charter Application has been approved, the Charter School will enter into a charter agreement with the Authorizer (the "Charter Agreement"). The Charter School is therefore authorized by the Charter Application, Charter Agreement and the Authorizer to supervise and control such Charter school and is invested with all powers necessary or desirable for carrying out the educational program contemplated in this Agreement.

1.2. Agreement. The Charter School hereby contracts with ECE, to the extent permitted by law, for the provision of all labor and supervision necessary for the provision of educational services to students, and the management, operation and maintenance of the Charter School in accordance with the educational goals, curriculum, methods of pupil assessment, admission policy and criteria, school calendar and school day schedule, age and grade range of pupils to be enrolled, educational goals, and method to be used to monitor compliance with performance of targeted educational outcomes, all as adopted by the Charter School's Board of Directors (the "Board") and included in the Charter Agreement between the Charter School and the Authorizer. ECE's obligations to the Charter School shall be only as expressly set forth in this Agreement. Duties required to be carried out for the operation of the Charter School which are not expressly set forth herein as being ECE's responsibility shall remain the Charter School's sole responsibility.

1.3. Designation of Agents. The Board designates the employees of ECE as agents of the Charter School having a legitimate educational interest such that they are entitled to access to educational records under 20 U.S.C. §1232g, the Family Rights and Privacy Act ("FERPA") and other applicable law. The Board, subject to its discretion, hereby authorizes ECE to communicate with and negotiate on the Board's behalf with all state and governmental agencies, as directed by the Board.

1.4. Status of the Parties, ECE is an independent nonprofit corporation and is not a division or a part of the Charter School. The Charter School is a North Carolina nonprofit corporation that qualifies for exemption from taxation under Section 501(c)(3) Internal Revenue Code, and is not a division or part of ECE. The parties to this Agreement intend that the relationship created by this Agreement is that of an independent contractor and does not create an employer employee relationship. Except as expressly provided in this Agreement, no agent or employee of ECE shall be deemed to be the agent or employee of the Charter School. ECE shall be solely responsible for its acts and the acts of its agents, employees and subcontractors. The relationship between ECE and the Charter School is based solely on the terms of this Agreement, and the terms of any other written agreements between ECE and the Charter School.

ARTICLE 2.
TERM

This Agreement shall be effective as of the date first written above and shall continue for an initial term consistent with the term of the Charter Agreement unless terminated or cancelled earlier in accordance with this Agreement. After the initial term, then the term of the Agreement shall be extended automatically to a term consistent with any Charter Agreement extension (i) to the extent ECE performs in accordance with the terms of this Agreement, and (ii) in the event that the Charter Agreement is extended or replaced, the term of the extension of the Agreement shall correspond to the length of the renewed or extended Charter Agreement unless this Agreement is otherwise terminated or cancelled earlier in accordance with this Agreement. Should the lease for the Charter School premises be terminated by either the Charter School or the landlord, for any reason, or is otherwise not operative for any reason, this Agreement shall also terminate effective the date of termination of such lease.

ARTICLE 3.
FUNCTIONS OF ECE

3.1 Responsibility. ECE shall be responsible and accountable to the Board for the operation and performance of the Charter School in accordance with the Charter Agreement. ECE's responsibility is expressly limited by: (i) the Charter School's Annual Budget, which is to be submitted and approved by the Board as provided in this Agreement, and (ii) the availability of state funding to pay for said services. Neither ECE nor the Charter School shall be required to expend Charter School funds for services in excess of the amount set forth in the Charter School's Annual Budget. There is nothing in the Agreement which shall delegate the ultimate authority of the Charter School to ECE.

3.2 Educational Program. ECE agrees to design and assist the Charter School in the implementation of the Educational Program as set forth in the Charter Agreement. In the event ECE determines that it is necessary to modify the Educational Program, ECE shall inform the Board of the proposed changes and obtain Board approval, and if required under the Charter Agreement, approval of the Authorizer. The parties hereto acknowledge that essential principles of the Educational Program are its' flexibility, adaptability and capacity to change in the interest of continuous improvement and efficiency, and that the Charter School and ECE are interested in results and not in inflexible prescriptions. Not less than annually, and otherwise as requested, ECE will provide the Board with updated reports on progress towards implementing each of the Charter School's educational goals in the Educational Program.

3.3 Specific Functions. ECE shall be responsible for the management, operation, accounting and Educational Program at the Charter School. Such functions include:

3.3.1 Oversee management of the Charter School, in accordance with this Agreement, the non-profit purpose of the Charter School, the Charter Agreement and subject to the direction given by the Charter School;

3.3.2 Oversee and administrate delivery of the Educational Program, including the selection of instructional materials, personnel, equipment, technology and supplies, and the administration of extra-curricular and co-curricular activities and programs approved by the Charter School. Perform repeated evaluation, assessment and continuous improvement of the educational curriculum and program development and report findings to the Charter School upon its request;

3.3.3 Oversee the selection, and application of technology services required to facilitate operation of the Charter School;

3.3.4 Oversee design and implementation of personnel functions, including professional development for the school principal, administrators, and instructional personnel; drafting operations manuals, forms (including teacher offer letters, applications, enrollment and similar forms), and management procedures, as the same are from time to time developed by ECE and as approved or requested by the Charter School;

3.3.5 Management of the business administration of the Charter School;

3.3.6 Management of the accounting operation, including general ledger management and financial reporting including identifying and applying for grants, spending and administering any grant funding obtained in compliance with the specific terms and conditions of said grants and participating in any audits related thereto, and preparing the proposed annual budget for presentation to the Charter School for modification, amendment or approval; provided that any modifications or amendments shall be approved by express vote of the Charter School and be consistent with the staffing and educational models set forth in the Charter Agreement, and;

3.3.7 Any other function necessary or expedient for the administration of the Charter School pursuant to the Charter Agreement and as agreed upon between ECE and the Charter School.

3.4 Facilities. ECE, or its assignee, shall provide the Charter School services including the identification, assessment, and development of a site or facilities, upon terms to be set forth in a separate development agreement between the parties.

3.5 Purchases. Purchases made by ECE on behalf of the Charter School with the Charter School's funds, such as non-proprietary instructional and/or curriculum materials, books and supplies, and equipment will be the property of the Charter School. ECE shall own all proprietary rights to, and the Charter School's proprietary interest shall not include, curriculum or educational materials that are developed or copyrighted or similarly protected by ECE, including without limitation curriculum or educational materials that are developed by ECE with funds from the Charter School. ECE's educational materials and teaching techniques used by or at the Charter School shall be subject to disclosure to the extent required by law. Such disclosure does not apply to any capital items leased or purchased by ECE with ECE's own funds.

3.6 Educational Materials. ECE shall grant the Charter School a non-exclusive, non-transferable license to use all curriculum, educational, training, and other materials that are developed, copyrighted, owned, or otherwise provided by ECE (the "Licensed Materials") for use by the Charter School's administration, teachers, and staff for the delivery of the Educational Program during the term of this Agreement (the "Permitted Uses"). Charter School hereby agrees to and acknowledges ECE's rights and

ownership in the Licensed Materials, and agrees not to challenge such ownership or rights. Charter School further agrees that, upon termination of this Agreement, for any reason, that it will immediately cease all use of the Licensed Materials, and that it will return any and all copies of the Licensed Materials to ECE, and destroy or delete any remaining copies of the Licensed Materials.

3.7 Use of Encompass Marks. The parties agree and acknowledge that ECE owns the right to use the marks and designations "Encompass" and "Encompass Montessori," as well as associated logos and wordmarks, in connection with the provision of educational services (the "Encompass Marks"). ECE hereby grants to the Charter School the nonexclusive right to use the Encompass Marks in connection with its marketing, promotion, and operation of the Charter School during the term of this Agreement. Charter School will not attack, challenge the validity or enforceability of the Encompass Marks. Charter School acknowledges that its right to use the Encompass Marks is contractual only, and that non property or other rights to any of the Encompass Marks are granted it by virtue of this Agreement. Charter School shall not engage in any conduct which, in the opinion of ECE, is detrimental to the Encompass Marks or the goodwill connected with them, or that is inconsistent with the standards, directors, and specifications, established by ECE for use of the Encompass Marks or provision of educational services under the marks. Charter School agrees that, upon termination of this Agreement for any reason, that it will immediately (i) cease all use of the Encompass Marks; (ii) destroy all materials bearing or referring to any of the Encompass Marks; (iii) cancel any orders for materials bearing or referring to the Encompass Marks.

3.8 Subcontracts. ECE shall not subcontract the management, oversight or operation of the teaching and instructional program, except as specifically permitted in this Agreement or with approval of the Board. Notwithstanding the foregoing, ECE reserves the right to subcontract any and all aspects of all services needed by the Charter School.

3.9 Place of performance. ECE reserves the right to perform functions other than instruction, such as purchasing, professional development, and administrative functions, off-site, unless prohibited by state or local law or Charter Agreement.

3.10 Ongoing Student Recruitment. ECE shall develop and manage ongoing recruitment of students subject to general recruitment and admission policies of the Charter School. Students shall be selected in accordance with the procedures set forth in the Charter Agreement and in compliance with applicable laws. ECE shall present a plan to the Charter School to solicit and recruit enrolment of students by various means, which may include but shall not be limited to the following: paid and unpaid media advertisements in a newspaper of general circulation, mailings to parents/guardians of prospective students, word-of-mouth and presentations to interested groups and distribute information through adve1tisements.

3.11 Due Process Hearings. ECE shall, at the Board's direction, provide student due process hearings in conformity with the requirements of state and federal law regarding discipline, special education, confidentiality and access to records, to an extent

consistent with the Charter School's own obligations, and, if necessary, retain counsel on behalf of the School. The Board shall retain the right to provide due process as required by law.

3.9 Legal Requirements. ECE shall provide Educational Programs that meet federal, state, and local requirements, and the requirements imposed under applicable laws and the Charter Agreement, unless such requirements are or have been waived.

3.10 Rules and Procedures. ECE shall recommend reasonable rules, regulations and procedures applicable to the Charter School and is authorized and directed to enforce such rules, regulations and procedures adopted by the Charter School.

3.12 Pupil Performance Standards and Evaluation. ECE shall be responsible and accountable to the Board for the performance of students who attend the Charter School. ECE will utilize assessment strategies required by the terms of the Charter Agreement. The Board and ECE will cooperate in good faith to identify measures of and goals for Charter School students and school performance, including but not limited to academic achievement and parent satisfaction. ECE shall perform its duties and responsibilities as set forth in this Agreement to the reasonable satisfaction of the Board.

3.13 Services to Disabled Students and Special Education. ECE shall provide special education services to students who attend the Charter School in conformity with the requirements of state and federal law. ECE may subcontract as necessary and appropriate for the provision of services to students with special needs, subject to approval of the Board. Such services shall be provided in a manner that complies with local, state and federal laws and applicable regulations and policies. Consistent herewith, the Board acknowledges the individualized nature of services that may need to be provided to disabled and special needs students and the impact that the provision of such individualized services may have on the Annual Budget. The Board and ECE mutually agree to adjust the Annual Budget as deemed necessary with respect to the provision of services to disabled and special needs students under this paragraph, as required by law.

3.14 Contract between the Charter School and the Authorizer. ECE will not act in a manner that will cause the Charter School to be in breach of its Charter Agreement with the Authorizer.

3.15 Unusual Events. ECE agrees to timely notify the Board and/or school administrator of any anticipated or known: (i) material health or safety issues, (ii) labor, employee or funding problems, or (iii) problems of any other type that could adversely affect the Charter School in complying with its responsibilities hereunder or its responsibilities under the Charter Agreement.

3.16 Charter School Records. The financial and student educational records pertaining to the Charter School are Charter School property, and such records are subject to the provisions of the applicable freedom of information act(s) to the extent required by and permitted by applicable law, including FERPA. All Charter School records shall be physically or electronically available, upon request and pursuant to

applicable law, at the Charter School. Except as prohibited under the Charter Agreement and applicable law, the Authorizer and the public shall have access to the Charter School's records.

3.17 ECE Performance Goals.

3.17.1 Timely submission of required reports set forth in this Agreement;

3.17.2 Strict adherence to the approved Annual Budget for the operation and management of the Charter School, with no aggregate cost over- runs; and

3.17.3 Such performance goals contained within the Charter Agreement and the Charter Application.

3.18 Educational and Other Services. Upon Board approval, ECE shall provide certain educational and other services. Such services may include but are not limited to certain technology services, proprietary curriculum and other instructional tools as well as school development services which may be provided by ECE, its affiliates or third-party entity.

ARTICLE 4.
OBLIGATIONS OF THE BOARD

4.1 Good Faith Obligation. The Board shall be responsible for its fiscal and academic policy. The Board shall exercise good faith in considering the recommendations of ECE, including but not limited to, ECE's recommendations concerning policies, rules, regulations and budgets. If the Board's unwillingness to adopt ECE's reasonable recommendations with respect to policies, rules, and regulations specifically inhibits ECE's ability in implementing the school design as set forth in the Charter Application, ECE shall have the option of terminating this Agreement.

4.2 Assistance to ECE. The Charter School shall cooperate with ECE in furnishing all information and submitting all forms and reports required in association with this Agreement, including timely notice of all Board meetings. The Charter School shall timely furnish to ECE all documents and records necessary for ECE to properly perform its responsibilities under this Agreement.

4.3 Unusual Events. The Charter School agrees to timely notify ECE of any anticipated or known: (i) material health or safety issues, (ii) labor, employee or funding problems, or (iii) problems of any other type that could adversely affect ECE in complying with its responsibilities hereunder.

4.4 Retained Authority. The Board shall retain the authority to make reasonable regulations relative to anything necessary for the proper establishment, maintenance, management, and carrying-on of the Charter School, including regulations relative to the conduct of pupils while in attendance at the Charter School or en route to and from the Charter School.

4.5 Food Service. The Charter School shall be managed, operated and administered by or shall otherwise provide authority to ECE to manage, operate and administer the Food Service for the Charter School including but not limited to cause all conditions necessary to satisfy all requirements of the Federal Statutes regarding the National School Lunch Program at 7 C.F.R. §210.1, et seq.

ARTICLE 5.
FINANCIAL ARRANGEMENTS

5.1 Revenues. Except as hereinafter provided, all monies received by the Board shall be deposited in the Charter School's depository account with a financial institution acceptable to the Board and ECE. The signatories on the account shall only be the Board members or designated ECE employees designated by the Board. Interest income earned on Charter School depository accounts shall accrue to the Charter School. Except as specifically excluded by the terms of this Agreement, the term "Revenues" shall include all funds actually received by or on behalf of the Charter School, including but not limited to:

5.1.1 Funding for public school students enrolled in the Charter School.

5.1.2 Special education funding provided by Federal, State and Local Governments to the Charter School that is directly allocable to special education students in the Charter School.

5.1.3 Gifted and Talented funding provided by Federal, State and Local Governments that is directly allocable to Gifted and Talented students in the Charter School.

5.1.4 At-Risk Funding provided by Federal, State and Local Governments to the Charter School that is directly allocable to At-Risk students in the Charter School.

5.1.5 Funding provided by Federal, State and Local Governments to the Charter School that is directly allocable to students in the Charter School with limited English proficiency.

5.1.6 Federal, State and Local grant sources, including Title I and Charter School start-up funds, which are directly allocable to the Charter School.

5.1.7 Grants and donations received by the Charter School (except to the extent ECE is not required or involved in soliciting, administering, or managing such grants and/or donations).

5.1.8 Fees charged to students and others for extra services as and to the extent permitted by law (all of the above are hereinafter collectively referred to as the "Revenues").

5.2 Operating Advances. The Board may advance funds to ECE for the fees or expenses associated with the Charter School's operation provided that documentation for the fees and expenses are provided for Board ratification. The Revenues shall be expended by ECE in accordance with the approved Budget and as otherwise authorized by the Board. The expenditure of Revenues received from governmental entities shall be consistent with all applicable regulations and policies, and in the case of private donations, the directives of the donor where applicable. To the extent that there are not sufficient funds in the Operating Account to pay Operating Expenses, ECE may, at ECE's option, deposit funds into the Charter School Operating Accounting ("Operating Advances"). Operating Advances can only be made in accordance with the approved Annual Budget. The Charter School shall reimburse ECE all Operating Advances, together with interest earned thereon from Total Revenues as and when the funds become available; provided, however, that if at the end of each Fiscal Year Total Revenues, after payment of Debt Service and Operating Expense, are insufficient to reimburse all Operating Advances attributable to such Fiscal Year, ECE may forgive the un-reimbursed balance of Operating Advances, including interest earned thereon.

5.3 Budget.

5.3.1. ECE shall manage the budget, accounting, and financial reporting functions for the Charter School in accordance with the requests of the Authorizer, the provisions of the Charter Agreement and the approved Annual Budget by the Board. Such accounting, financial reporting, and any auditing, as set forth in paragraph 5.4 below, shall be performed in accordance with generally accepted government accounting and auditing principles.

5.3.2. ECE shall prepare and submit to the Charter School for its approval for each Fiscal Year (July 1-June 30), an Annual Budget for the Charter School. Each Annual Budget shall state an estimate for the coming Fiscal Year for (i) Total Revenues; (ii) Operating Expenses; (iii) Reserve Expenses; (iv) Audit Expenses; and (v) Fund Balance.

5.3.3 Reserve Expenses means the amount of money reflected in the Annual Budget that ECE must deposit into an account for Reserve Expenses. The Reserve Expense Account shall be used for the establishment of reasonable reserves for long-term renewal and replacement of the School Facility or portions thereof. ECE shall obtain approval from the Charter School to withdraw funds from the Reserve Expense Account. There shall be a goal of increasing both the reserve and fund balance by 1% of funding per year.

5.3 Budget Process.

5.4.1 ECE shall submit to the Charter School for its review and approval a preliminary Annual Budget for each Fiscal Year for the Charter School, on or before May 31st of the current Fiscal Year. It is the intent of this provision that ECE prepare and submit to the Charter School a balanced Annual Budget, which shall provide for full payment of the (i) Total Revenues; (ii) Operating Expenses; (iii)

Reserve Expenses, (iv) Audit Expenses and (v) Fund Balance with respect to the Charter School.

5.4.2 The Charter School must notify ECE in writing that it approved the Annual Budget within thirty days of submission by ECE, which approval shall not be unreasonably withheld or delayed. If the Charter School does not approve the Annual Budget, the Charter School shall give specific reasons therefore and shall continue to deposit the balance of Total Revenues into the Charter School Operating Account pursuant to its obligations in this Article 5. If the Charter School does not approve the Annual Budget within thirty days of submission by ECE, Charter School shall be deemed to approve the Annual Budget. ECE and the Charter School acknowledge that a Final Budget shall be completed no later than June 30.

5.4.3 ECE may amend the Annual Budget(s) not less frequently than semi-annually in order to reflect the results of the most recent student count and may make such other modifications as it may from time to time find necessary. Any such amendment shall only be valid if approved by the express vote of the Board. ECE shall report any changes upon which the Annual Budget was based within fifteen days after ECE becomes aware of any such change. ECE shall operate and manage the Charter School according to its Annual Budget.

5.4.4 ECE shall use reasonable efforts to operate the Charter School within its Annual Budget.

5.4 Fee. ECE shall be entitled to compensation for its services 15% of "Revenues" which shall be set forth within the approved Annual Budget.

5.5 Availability of Funds. ECE shall only be required to perform its responsibilities under this Agreement to the extent that there are sufficient Revenues to make payments in accordance with the terms of the Budget.

5.6 Financial Reporting. ECE shall provide the Board with:

5.7.1 The projected Annual Budget as required by the terms of this Agreement.

5.7.2. Detailed statements of all Revenues received, and detailed statements of all expenditures for services and or expenses rendered or incurred to or on behalf of the Charter School, whether incurred on-site or off-site, upon request.

5.7.3. Regular financial statements, to correspond with the schedule of meetings of the Charter School, including a balance sheet and a statement of revenues and expenditures.

5.7.4. Other information on a periodic basis to enable the Board to (a) monitor ECE's performance and the efficiency of its operation of the

Charter School, and (b) furnish reports and information which the Charter School is required to provide pursuant to its Charter Agreement and/or applicable laws.

5.7 Records. ECE shall keep accurate financial records pertaining to its operation of the Charter School, together with all Charter School financial records prepared by or in possession of ECE and shall retain all of the said records for a period of time as may be required by the Charter Agreement. ECE and the Charter School shall maintain the proper confidentiality of personnel, students, and other records as required by law.

5.9 Review of Operational Budget. The Board shall be responsible for reviewing and approving the Annual Budget of the Charter School as presented by ECE.

5.10 Annual Audit. The Board shall select and retain an independent auditor, to conduct an annual audit of the Charter School in accordance with the Charter School's authorizing documents. Subject to applicable law, all finance and other records of ECE related to the Charter School will be made available to the Charter School's independent auditor.

5.11 Start-up Operating Losses. With Charter School approval, ECE may, in its sole discretion, provide funds for operating losses for the Charter School during the start-up period. ECE advances shall be budgeted and shall be in amounts acceptable to ECE. ECE shall be reimbursed from the Revenues as and when funds are available.

5.12 Marketing. Marketing and development costs paid by or charged to the Charter School shall be limited to those costs specific to the Charter School program and may include costs for the marketing and development of the Charter School.

ARTICLE 6.
PERSONNEL & TRAINING

6.1 Training. ECE shall provide training in its methods, curriculum, program, and technology to all teaching personnel on a regular basis. Instructional personnel shall receive at least the minimum hours of professional development required by applicable laws. Non-instructional personnel shall receive such training as ECE determines reasonable and necessary under the circumstances.

6.2 Limitations on Discretion. All decisions made by ECE, and any discretion exercised by ECE, in its determination of staffing levels and its selection, evaluation, assignment, discipline, and transfer of personnel, shall be consistent with the approved Annual Budget, local, state and federal law, and consistent with the parameters adopted by the board and included within the Educational Program.

6.3 Non-Solicitation. The Charter School agrees that during the term of this

Agreement and for a period continuing for one year after its termination, the Charter School will not directly or indirectly solicit, recruit, attempt to solicit, hire or recruit, any employee of ECE that has provided services to the Charter School, or any vendor or subcontractor of ECE that has provided services to the BCCA during the twelve months prior to the date of the Agreement's termination. Should the Charter School violate the restrictive covenant this section, the obligations hereunder shall run for a period of one year from the first date the Charter School ceases to be in violation of such obligation.

ARTICLE 7.
DEFAULT

7.1 Default. An event of default ("Event of Default") by either party shall be limited to the following:

7.1.1 The Charter School fails to make any payment due hereunder within ten (10) business days after the date such payment was due.

7.1.2 The Charter School materially breaches any of its other obligations under this Agreement and fails to cure such material breach within sixty (60) days after notice of such breach.

7.1.3 If ECE shall under such law as shall be applicable to it commence any case or proceeding, or file any petition in bankruptcy, or for reorganization, liquidation or dissolution, or be adjudicated, insolvent or bankrupt, or shall apply to any tribunal for a receiver, intervener, conservator or trustee for itself or for any substantial part of its property; or if there shall be commenced against it any such action and the same shall remain un-dismissed for more than thirty (30) days.

7.1.4 If ECE is found by an administrative or judicial body to have made fraudulent use of funds, or if an administrative or judicial body has revoked any license that may be required for ECE to carry on its business and perform its obligations and functions under this Agreement.

7.1.5 If ECE materially breaches this Agreement. Material Breach includes (i) failure to account for its expenditures or pay the Cha1ter School's operating costs (provided funds are available to do so), (ii) failure to follow policies, procedures, rules or curriculum duly adopted by the Board which is not in violation of this Agreement or the law, or (iii) insufficient progress has made in attaining student achievement objectives of the Agreement and the Charter Agreement, and it is not likely that such objectives can be achieved before expiration of this Agreement, (iv) if the health, safety, or welfare of the students is threatened, (v) violation of law, (vi) the

revocation, suspension or termination of licenses/ce1tifications needed for any Charter School operations solely as direct result of an act or failure to act by ECE, and (vii) the revocation by the Authorizer of the Charter Agreement solely as the direct result of an act or failure to act ECE. In the event of a material breach, ECE shall have sixty(60) days after receipt of written notice to remedy said breach unless the breach affects the health, safety or welfare of students in which case ECE shall have ten (10) days after receipt of written notice to remedy.

7.2 Remedies. Upon the occurrence of an uncured Event of Default by either party, the non-breaching party shall be entitled to pursue all remedies available under law or equity, including without limitation, terminating this Agreement upon seven (7) days prior written notice. In the event of termination of this Agreement for any reason by either pa1ty prior to the end of this Agreement's term, ECE may, for a fee reasonably acceptable to ECE, provide the Charter School reasonable assistance for up to thirty (30) days to assist in the transition to another administrative or structural arrangement (although ECE shall not be required to provide any assistance to another management company or service provider). However, ECE will abide by all state laws that govern transition obligations, including but not limited to:

7.2.1 Transfer to such entity of all student records;

7.2.2 Transferring any and all other non-proprietary information and providing necessary assistance to the new program or education service provider to ensure the least disruption of the Charter School operation as a result of the termination of this agreement;

7.2.3 Transferring and/or assigning to the Charter School all contracts, agreements, licenses, permissions, and other rights and privileges related to the operation of the Charter School; including, at ECE's option, assignment of contracts for Personnel.

ARTICLE 8.
INDEMNIFICATION

Each party to this Agreement does hereby indemnify and hold harmless the other, and the Authorizer, and their respective boards of directors, pat1ners, officers, employees, agents, representatives, and attorneys from and against any and all claims, actions, damages, expenses, losses or awards which arise out of (i) its negligence, (ii) its action taken or not taken, or (iii) its noncompliance or breach of any of the terms, conditions, warranties, representations, or undertakings contained in or made pursuant to this Agreement. As used in this subsection, "party" shall include the party's trustees, directors, officers, employees, agents, representatives and attorneys. Such indemnification may be achieved by the joint purchase of general liability and property insurance policies, or by such other means as the parties may mutually agree.

ARTICLE 9.
INSURANCE

9.1 Insurance Coverage. Each party shall maintain such insurance in the coverage amounts as may be required by the Charter Agreement, with the other pat1y listed as an additional insured. Revenues from the Charter School will be used to purchase insurance defined in the Charter Agreement to operate the Charter School, including the provision of Directors & Officers Liability insurance for the Board. Each party shall, upon request, present evidence to the other that it maintains the requisite insurance in compliance with the provisions of this paragraph. Each party shall comply with any information or reporting requirements required by the other party's insurers, to the extent reasonably practicable.

9.2 Workers' Compensation Insurance. Each party shall maintain workers compensation insurance as required by the Charter Agreement and applicable laws, covering their respective employees.

ARTICLE 10.
WARRANTIES AND REPRESENTATIONS

10.1 Charter School Warranties and Representations. The Charter School represents that it has the authority under law to execute, deliver and perform this Agreement and to incur the obligations provided for under this Agreement. The Board warrants that its actions have been duly and validly authorized, and that it will adopt any and all resolutions or expenditure approvals required for execution of this Agreement.

10.2 **ECE Warranties and Representations.** ECE warrants and represents that it is a limited liability company authorized to conduct business in the State of North Carolina. ECE will comply with all registration and licensing requirements relating to conducting business under this Agreement. The Charter School agrees to assist ECE in applying for such licenses and permits and in obtaining such approvals and consents. ECE further warrants that there is no pending or threatened litigation that would impact its ability to perform its obligations under this Agreement.

10.3 Mutual Warranties. The Charter School and ECE mutually warrant to the other that there are no pending actions, claims, suits or proceedings, to its knowledge, threatened or reasonably anticipated against or affecting it, which if adversely determined, would have a material adverse effect on its ability to perform its obligations under this Agreement.

ARTICLE 11.
MISCELLANEOUS

11.1 Sole Agreement. This Agreement supersedes and replaces any and all prior agreements and understandings between the Charter School and ECE.

11.2 Force Majeure. Notwithstanding any other sections of this Agreement, neither party shall be liable for any delay in performance or inability to perform due to acts of God or due to war, riot, embargo, fire, explosion, sabotage, flood, accident, labor strike, pandemic, or other acts beyond its reasonable control; provided either party may terminate this Agreement in accordance with the termination provisions contained in this Agreement if sufficient grounds exist as provided in the Article of this Agreement governing termination.

11.3 Governing Law. The rights of all parties hereto shall be subject to the jurisdiction of and be construed according to the laws of the State of North Carolina. ECE and the Charter School hereby waive the right to a jury trial in any action, proceeding or counterclaim brought by either ECE or the Charter School against the other.

11.4 Agreement in Entirety. This Agreement constitutes the entire agreement of the parties.

11.5 Official Notices. All notices and other communications required by the terms of this Agreement shall be in writing and sent to the parties hereto at the facsimile number or address set forth below. Notice may be given by: (a) by facsimile with written evidence of confirmed receipt by the receiving party of the entire notice, (b) certified or registered mail, postage prepaid, return receipt requested, or (c) personal delivery. Notice shall be deemed to have been given on the date of transmittal or personal delivery if given by facsimile or personal delivery, or upon the date of postmark if sent by certified or registered mail. Notices to the Charter School shall be sent to the current address of the then current Board President or Chairman, with a copy to the then current Board attorney. The address of the parties hereto for the purposes aforesaid, inclusive of the address of the initial Board President or Chairman and Board attorney, are as follows:

The Charter School:
Encompass Montessori
4030 Wake Forest Road, Suite 349
Raleigh, NC 27609

ECE:
Epic Change Education
997 8th Street, #873
Gotha, FL 34734

11.6 Assignment. Either party may assign this Agreement with the written consent of the other.

11.7 Amendment. This Agreement shall not be altered, amended, modified or supplemented except in writing and approved by the Board and signed by both the President or Chairman of the Board and the CEO of ECE.

11.8 Waiver. No waiver of any provision of this Agreement shall be deemed or shall constitute a waiver of any other provision. Nor shall such waiver constitute a continuing waiver unless otherwise expressly stated.

11.9 Cost and Expenses. If any patty commences an action against another patty as a result of a breach or alleged breach of this Agreement, the prevailing party shall be entitled to have and recover from the losing patty its reasonable costs and attorneys' fees (including those incurred at appellate levels).

11.10 Delegation of Authority. Nothing in this Agreement shall be construed as delegating to ECE powers or authority of the Board, which are not subject to delegation by the Board under applicable law.

11.11 Compliance with Law. The parties to this Agreement agree to comply with all applicable laws and regulations.

11.12 Compliance with Charter Agreement. The parties to this Agreement agree to comply with the terms and conditions set forth in the Charter Agreement.

11.13 Encumbrances and borrowing. No indebtedness of any kind incurred or created by the Charter School shall constitute an indebtedness of the State or the Authorizer, and no indebtedness of the Charter School shall involve or be secured by the faith, credit or taxing power of the State or the Authorizer. Unless otherwise agreed in writing by the Authorizer, each contract or legal relationship entered into by the Charter School will include the following provisions:(i) ECE acknowledges that the Charter School is not an agent of the Authorizer, and accordingly ECE expressly releases the Authorizer from any and all liability under this agreement. (ii) Any financial obligations of the Charter School arising out of the agreement are subject to annual appropriation by the Authorizer.

IN WITNESS WHEREOF, the undersigned have executed this Agreement as of the date and year first above written.

EPIC CHANGE EDUCATION
By: _____
Name: Sherilyn Moore
Title: CEO

CHARTER SCHOOL
By: _____
Name: Candace Fletcher
Title: Board President

Q84. **Attach Appendix A4.4: IRS Form 990**

Provide as Appendix A4.4 the IRS Form 990 (or equivalent documents if the organization does not file a 990) for the prior three years

Epic Change Education (ECE) was founded by a former public Montessori CEO in 2019 to support new education-related projects. Although Epic Change did not conduct any business over the past three years, the CEO kept the non-profit active legally so as to be ready to support new Montessori schools when the time came. That time is now. ECE will support Encompass Montessori's launch through the experience of its leadership and the relationships that have been built in the charter sector since 2008.

There are no 990s for the prior three years because ECE was not actively conducting business.

Q.83 **Provide as Appendix A4.3 the financial history and statements of the EMO/CMO over the last three years. Specifically, if contracting with an EMO, provide confirmation that the EMO is in good standing by providing bank statements from the prior three years.**

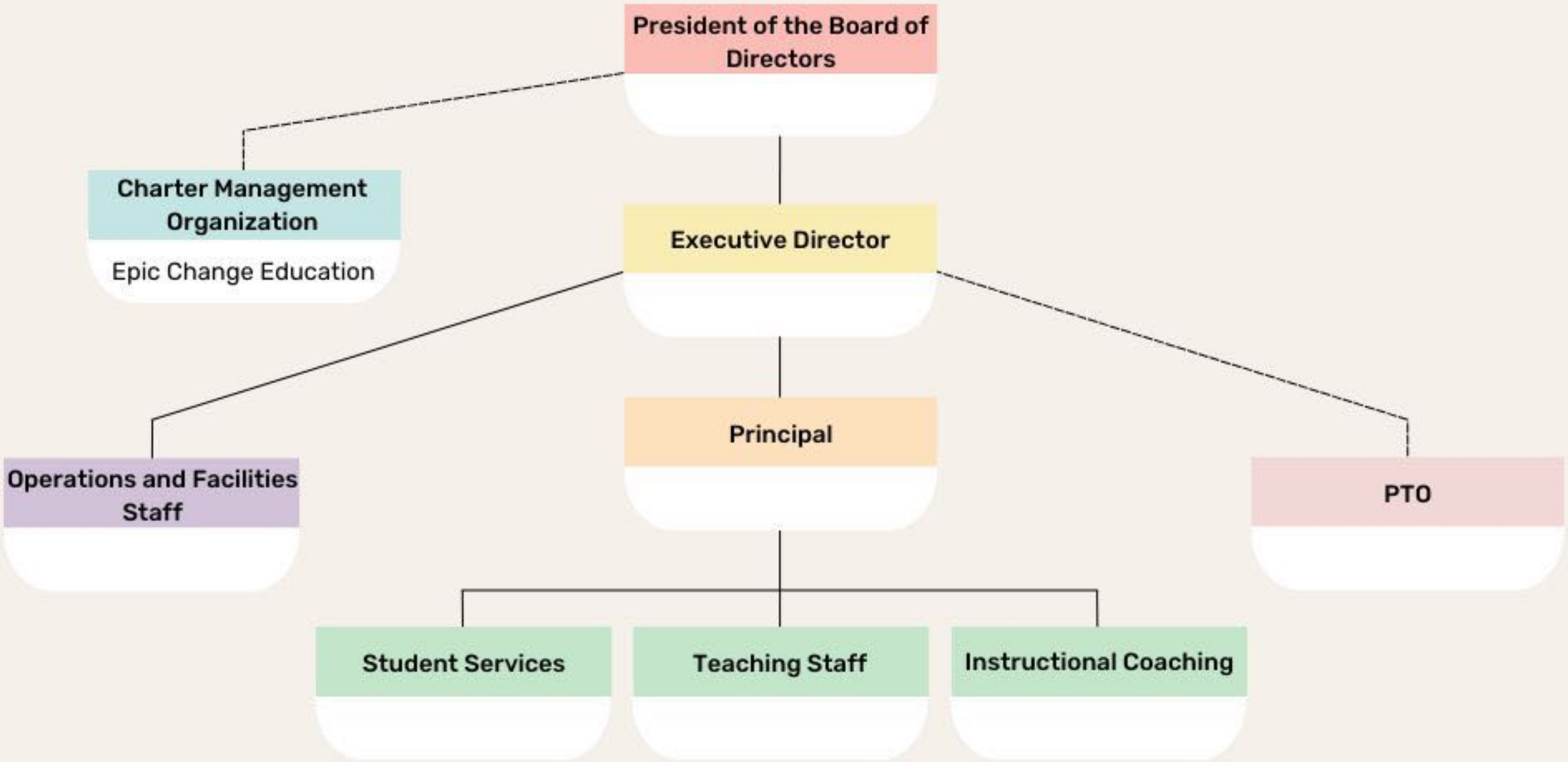
Epic Change Education (ECE) was founded by a former public Montessori CEO in 2019 to support new education-related projects. Although Epic Change did not conduct any business over the past three years, the CEO kept the non-profit active legally so as to be ready to support new Montessori schools when the time came. That time is now. ECE will support Encompass Montessori's launch through the experience of its leadership and the relationships that have been built in the charter sector since 2008.

There are no bank statements for the prior three years because ECE was not actively conducting business.

*Q22. Attach as Appendix F Federal Documentation of Tax-Exempt Status

Tax-exempt status for Encompass Montessori has been applied for. The IRS website is advising a 180-day turnaround.

ENCOMPASS MONTESSORI CHARTER SCHOOL ORGANIZATION CHART



EPIC CHANGE EDUCATION

SCHOOL DEVELOPMENT ORGANIZATION

April 22, 2025

Encompass Montessori
4030 Wake Forest Road, Suite 349
Raleigh, NC 27609

Re: Letter of Intent: Lease/Purchase Option

Dear Ms. Fletcher,

This Letter of Intent ("LOI") outlines the prospective terms under which Epic Change Education, Inc., a Florida not-for-profit corporation, its assignee, or an entity to be designated by it ("Landlord") will extend a lease ("Lease") to Encompass Montessori ("Tenant") for a school facility with all appropriate approvals and permissions. A formal lease-purchase agreement will be provided when a property has been identified. The Lease will include, but not be limited to, the following material terms:

TERM OF LEASE ("Term"): Twenty-five (25) years, as measured from the Rent Commencement Date (defined below), with four (4) five (5) - year options to renew.

PURCHASE OPTION: Tenant will have the option to purchase the Property together with any Improvements on the Property ("Improvements") during the period commencing on the first day of the first full calendar month following the date on which the Landlord notifies Tenant that Landlord has paid in full all indebtedness secured by all mortgages on the Property and Improvements and all other indebtedness of Landlord relating to the Property and Improvements , and ending 180 calendar days thereafter. The purchase price therefore will be the greater of (1) Landlord's reasonable attorney's fees and expenses of closing the option transaction, or (ii) $1,000. The other terms of such option will be subject to negotiation.

BASE RENT PAYMENT: Commencing on the date the Landlord delivers to Tenant possession of the Property ("Rent Commencement Date"), Tenant will pay Landlord monthly base rent ("Base Rent") during the Term. Such rent payment will be made no later than the first day of each calendar month.. The base rent will be an amount equal to the sum of (1) Landlord's Costs multiplied by eight percent (8%), which amount will be subject to annual escalations equal to the greater of 2.5% or the increase in the Consumer Price Index for All Urban Consumers CPI-U), plus (2) Landlord's debt service on the Property and Improvements.

NET ZERO LEASE: All costs of operating and maintaining the Property and Improvements, including but not limited to, repairs and maintenance, janitorial, cleaning, landscaping and grounds maintenance, parking lot maintenance, real estate or property taxes, all insurance required by the Landlord, and utilities, are the responsibility of Tenant and will be paid directly by Tenant.

DEFERRED LEASE PAYMENTS: A portion of the Base Rent may be deferred ("Deferred Payments"), if necessary. Subject to underwriting and financing terms, Deferred Payments will accrue from the Rent Commencement Date until the fourth anniversary of the Rent Commencement Date and will accrue interest at the annual rate of eight percent (8%), compounded monthly until repaid in full. Tenant may repay Deferred Payments in full at any time. Any outstanding Deferred Payments will become immediately due upon the earliest to occur of the exercise of the Purchase Option, other sale of the Property, a default by Tenant, the sixth anniversary of the Rent Commencement Date, or termination of the Lease.

SECURITY DEPOSIT: Tenant will pay a security deposit equal to the total amount of the first month's rent, due upon Lease execution.

USE OF PROPERTY: The Property will be used as a public charter school and affiliated activities and for no other purposes unless approved by Landlord at the Landlord's sole discretion.

LANDLORD IMPROVEMENTS: Tenant will provide to Landlord a proposal for such Improvements to the Property as Tenant desires to make in such form (including such plans and specifications) as Landlord may reasonably require. Any such Improvements will be as agreed by Landlord and Tenant and will comply with all applicable laws and regulations. At Tenant's expense, Landlord will obtain a proposal from its general contractor for the construction of such Improvements, which will include a Guaranteed Maximum Price ("GMP") for such construction. If Landlord and Tenant approve such proposal, Landlord will enter into a construction contract with such general contractor in accordance with such proposal. If, during the course of construction, it appears that the cost of construction will exceed the GMP, then Landlord and Tenant will either agree to such increased amount or modify the plans for the Improvement so the cost will not exceed the GMP (subject to any modifications as agreed by Landlord and Tenant).

DEVELOPMENT FEE: Tenant agrees that Landlord will include a development fee equal to four percent (4%) multiplied by the Landlord's Costs (as hereinafter defined but excluding such development fee for purposes of this calculation), . Such fee will be included in the calculation of the Base Rent.

SUBORDINATION OF FEES. If at any time during the term of the Lease, the Tenant enters into a contract with any service provider or development or management organization, the provider or organization will subordinate all fees and payments to any Lease payments throughout the entire term of the Lease.

INSURANCE. Tenant shall provide, at its expense, the following insurance coverage, naming Landlord as additional insured:

- Commercial General Liability of not less than $1,000,000 per occurrence and $3,000,000 aggregate.
- Worker's Compensation of not less than $1,000,000.
- Business Interruption of not less than 12 months of operations.
- Child Abuse/Molestation of not less than $3,000,000.
- Coverage for all third-party service providers of not less than $1,000,000.
- Cyber Security coverage of not less than $1,000,000.

LENDER'S REQUIREMENTS: Tenant will comply with any reasonable requirements imposed by the Landlord's lender.

COVENANTS: The Lease will require the Tenant to comply with certain reporting requirements and minimum financial coverage ratios, including but not limited to, as the following:

- Reporting of quarterly financials
- Reporting of annual audited financials
- Annual budget reporting
- Tenant maintaining a lease coverage ratio of at least 1.20 to 1.0
- Tenant maintaining at least 45 days of cash on hand starting on the first anniversary of the Rent Commencement Date
- Restrictions on additional debt
- Reporting a change of management
- Providing proof of non-profit status and compliance
- Reporting any change in insurance and restrictions on pledged revenues.

NON-BINDING: Except for the Paragraph titled "Confidentiality", this LOI is not a legally binding document but merely an expression of terms that the parties would find acceptable in a binding document, should they elect to execute one. This LOI and its terms are not binding on Landlord or Tenant, and this document will not serve as the basis for a cause of action by or against either party. Landlord or Tenant may cancel the transaction proposed hereby at any time prior to the execution by Landlord and Tenant of a Lease.

BROKERS: No brokers were involved in this lease transaction.

CONFIDENTIALITY: Landlord and Tenant will keep the existence and terms of this LOI confidential and will not disclose its existence or any of its terms to any third party other than the brokers listed above and Landlord's or Tenant's consultants, engineers, lenders, employees, accountants and attorneys.

ACCEPTANCE: If Tenant agrees with this LOI, please sign it in the space provided and return it to Landlord. This LOI will be null and void unless executed by Tenant and delivered to Landlord by 4:00 pm (Eastern Time) on May 30, 2025

AGREED:

By_____ By_____

Sherilyn Moore, President & CEO
EPIC CHANGE EDUCATION, INC.

Candace Fletcher, President
ENCOMPASS MONTESSORI

Academic	Grade Levels	Total Projected
Year 1	Kindergarten, 1	144
Year 2	Kindergarten, 1, 2	240
Year 3	Kindergarten, 1, 2, 3	336
Year 4	Kindergarten, 1, 2, 3, 4	432
Year 5	Kindergarten 1, 2, 3, 4, 5	528

Academic	Grade Levels	Total Projected
Year 1	N/A	N/A
Year 2	N/A	N/A
Year 3	N/A	N/A
Year 4	N/A	N/A
Year 5	N/A	N/A

Ethnicity/Race	# of Students	Percentage (%)	Knightdale	
American Indian or Alaska Native		0%		0.2%
Asian	22	5%		3.6%
Black or African American	151	35%		46.0%
Hispanic	151	35%		9.7%
Native HI or Pacific Islander		0%		0.0%
Two or More Races	22	5%		8.3%
White	86	20%		36.0%
EDS Subgroups		0%		
Economically Disadvantaged Students	259	60%		
Students with Disabilities	65	15%		
English Language Learners	73	17%		
Students Experiencing Homelessness		0%		

The Wake County Public School System (WCPSS) has faced significant overcrowding for over a decade, particularly in the fast-growing eastern region near Knightdale. As early as the 2013–14 school year, WCPSS operated at 96.9% capacity, prompting the district to reassign over 1,000 students from 25 overcrowded schools to overflow sites. This was not a temporary disruption. It marked the beginning of a long-standing capacity challenge that continues today.

Three of the schools impacted by overcrowding—Beaverdam Elementary, Rogers Lane Elementary, and River Bend Elementary—are all located within a 12–16 minute drive from Knightdale, NC. Their proximity and ongoing population growth in the area highlight the strain eastern Wake County families continue to face when seeking stable, quality public school options.

Today, overcrowding remains a reality. Lake Myra Elementary, located just 10 minutes from Knightdale, is projected to enroll 730 students next year—18.5% over its intended capacity of 616. To manage crowding, the district has leaned heavily on short-term solutions such as:

- Implementing multi-track year-round calendars that stagger student attendance to increase effective capacity,
- Utilizing nearly 1,000 portable classroom trailers, and
- Reassigning students across schools to balance numbers.

These measures often come at the expense of family stability, community connection, and student continuity. Meanwhile, families in Knightdale and the surrounding area lack access to public Montessori education, a proven approach that supports academic excellence, social-emotional development, and equitable learning environments.

Encompass Montessori is being proposed as a tuition-free, K–8 public charter school designed to serve eastern Wake County, particularly Knightdale and its neighboring communities. This school is not just about addressing overcrowding—it is about offering families a meaningful educational alternative rooted in the values of:

- Whole-child development,
- Culturally responsive and inclusive teaching, and
- Community-based schooling that fosters deep family engagement and belonging.

To assess local interest, we launched a digital survey through a clean and informative landing page, (photo attached) which invites families to express whether they would be

interested in a free, publicly funded K–8 Montessori school in Wake County. Early response patterns affirm what district data already suggests: families are interested in more quality options that are closer to home. In two weeks, 118 unique visitors found our website, which has not been promoted on social media, listed in search engines, or advertised, which clearly demonstrates the demand for public Montessori. To find our site, parents are digging deep and searching directly for “Wake County Montessori” and “Public Montessori near Raleigh” and other specific terminology. Our site does not rank high in any general searches for parents to find, so they are motivated to uncover a public Montessori educational solution for their children.

The need for Encompass Montessori is supported by:

- Decade-long overcrowding patterns in Wake County public schools, especially in eastern regions;
- Current capacity crises in nearby schools like Lake Myra Elementary;
- Lack of public Montessori options in Knightdale and surrounding communities;
- Growing family demand for alternative, holistic education that centers care, community, and culture.

Encompass Montessori will relieve enrollment pressures, offer educational innovation, and restore local choice to families who have too often had to compromise.

1730 Pennsylvania Avenue, Suite 250
Washington, DC | 20006 (202) 457-1999
Office
buildinghope.org

Building Hope
creating solutions for charter schools

April 15, 2025

North Carolina Department of Public Instruction
301 N. Wilmington Street
Raleigh, NC 27601-2825

Subject: Letter of Support for Encompass Montessori

Dear Members of the North Carolina Department of Public Instruction,

Building Hope is pleased to offer this letter of strong support for Encompass Montessori's application to launch a charter school. With over 20 years of experience partnering with impact-driven educational leaders to help schools thrive, including numerous public Montessori schools, we recognize the deep impacts a great school like Encompass can have on the students, families, and community it serves.

Encompass Montessori's support organization, Epic Change Education, is led by a public Montessori CEO and founder, who we built and financed a school facility for in 2017. Her passion for bringing this student-centered education to more students made that school a success, with over 1000 students and an 800 person waiting list. We are excited to partner with her again to support Encompass Montessori's success.

Building Hope anticipates partnering with Encompass Montessori and Epic Change Education to provide business and financial advisory services to secure facilities financing to support their unique educational model.

We believe Encompass Montessori has the potential to make a significant positive impact on the educational landscape, and we strongly encourage North Carolina Department of Public Instruction to approve their application.

In addition, if the charter school is unable to secure a start-up grant, Building Hope may secure a line of credit for the school to help with the startup costs. Building Hope can provide loan guarantees to qualifying schools to make facilities financing more affordable for public charter schools throughout the United States. Guarantees range in size from $250,000 to $1 million. They have a five-year term with a 1% commitment fee and a 1% annual guaranty fee.

Sincerely,

Richard Moreno
President, Building Hope Services

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	speaker	**Cognitive Verbs**
ask	text	answer
detail	topic	ask
information		clarify
issue		describe
media/medium		present
question		recount

ASSESSMENT CONSIDERATIONS

Students will not be assessed on the contents of the story of *How Geometry Got Its Name*.

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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

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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

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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

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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

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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

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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.

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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	*In addition to previous vocabulary:* 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

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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

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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.

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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 1/360 of a circle is called a "one-degree angle," and can be used to measure angles.

NOTES

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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	• 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.
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	

continues

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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

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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 and 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.

MONTESSORI 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.

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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.

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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.

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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

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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 (cm^2)
square foot (ft^2)
square inch (in^2)
square meter (m^2)
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 (cm^3)
cubic foot (ft^3)
cubic inch (in^3)
cubic meter (m^3)
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

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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)

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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)

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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.

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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.
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.
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.

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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.

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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

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CHAPTER 3

THEOREMS AND CONSTRUCTIONS

THEOREMS

SKILLS INVENTORY

Upper Elementary

Understands how theorems are used in geometry.

MONTESSORI 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.

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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.

MONTESSORI 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

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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

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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

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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-work 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
axis/axes
coordinate
coordinate axes
coordinate plane
coordinate system
direction
distance
first
first coordinate
first quadrant
four
graph
intersection/intersecting
length
line
mathematical problem
negative
number
number line
one
ordered pair
origin
pair
plane
point
polygon
quadrant
rational number
real-world problem
reflection
represent
second (ordinal number)
second coordinate
side
signed number
travel
two
vertex/vertices
x-axis
x-coordinate
y-axis
y-coordinate
zero

Cognitive Verbs

apply
arrange
define
graph
interpret
locate
recognize
relate
represent
solve
understand

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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)

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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

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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	

			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

				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	

			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	

			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.		

		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	

			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	

	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 Haxagonal Box	
			Large Haxagonal 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		

			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

			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	

			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)	

				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	

			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

				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	

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		

			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

				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

				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

				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

				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			

		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		

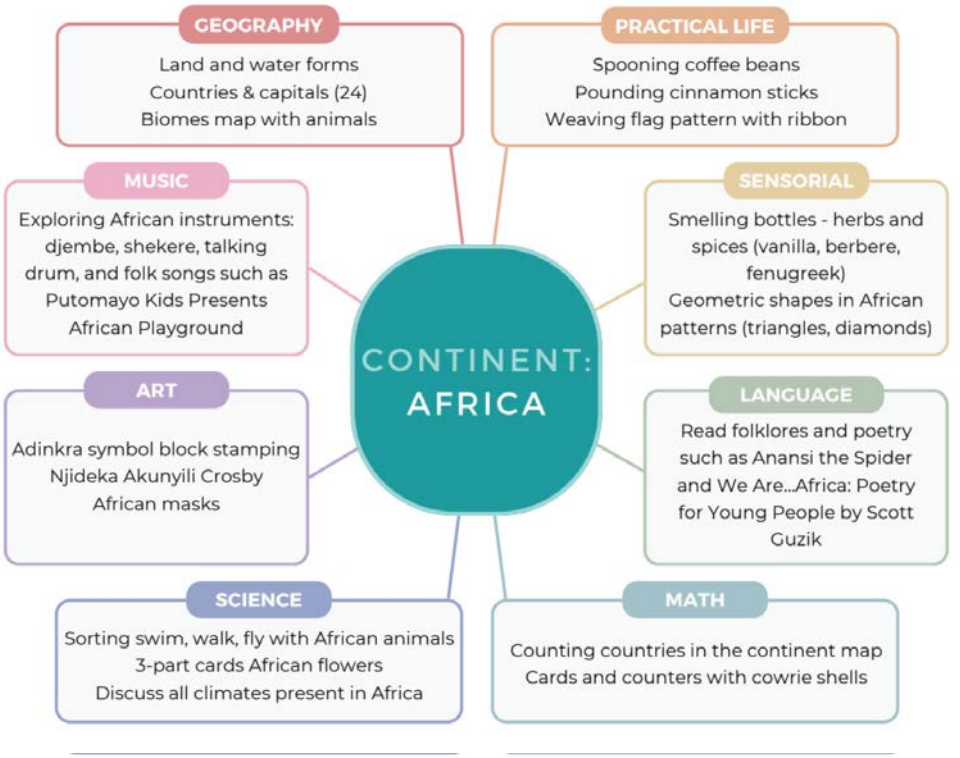
		Living and Non-Living Object/ Card Sort		
		Plant and Animal Object/Card Sorts		
	Zoology			
		Vertebrates and Invertebrates		
			Vertebrate and Invertebrate Object/Card Sorts	
			Vertebrate Puzzles	
			Classified Nomenclature—External Parts	
		Life Cycles		
			Life Cycle of a Frog	
			Life Cycle of 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 Thinghs	
			Seasons	
			Natural Resoures	
			Trash and Recycling	

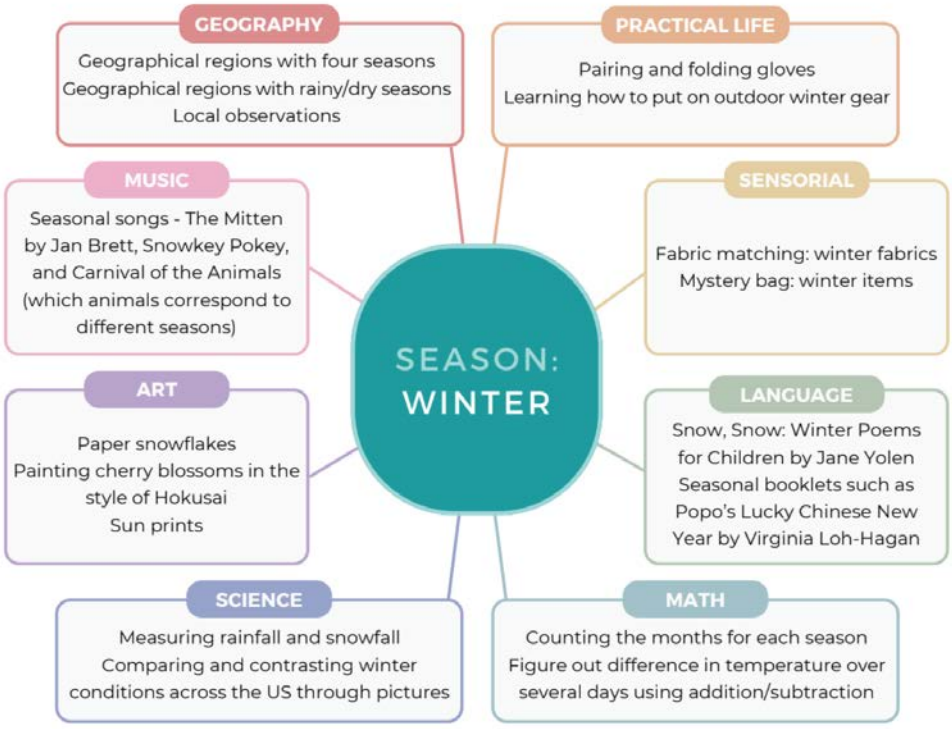
Physical Science		Skills Inventory: Demonstrates understanding of magnetism and can sort magnetic or non-magnetic objects. Skills Inventory: Demonstrates understanding of buoyancy and can sort objects that sink or float. Skills Inventory: Demonstrates understanding of light by identifying objects as 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	

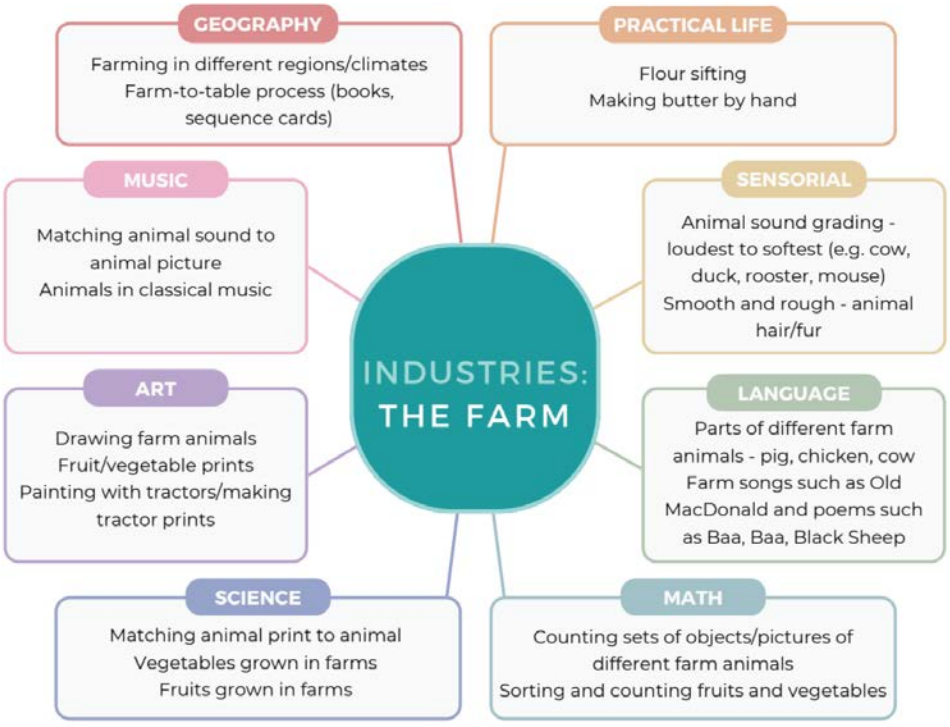
			Resolving Conflicts	
			Cause and Effect	
		Life Beyond the School		
			Child's Cosmic Address	
			People in Our Community	
			Staying Safe	
Political Geography		Skills Inventory: Understands the different uses for globes and maps Skills Inventory: Identifies the political geography of the world including 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		

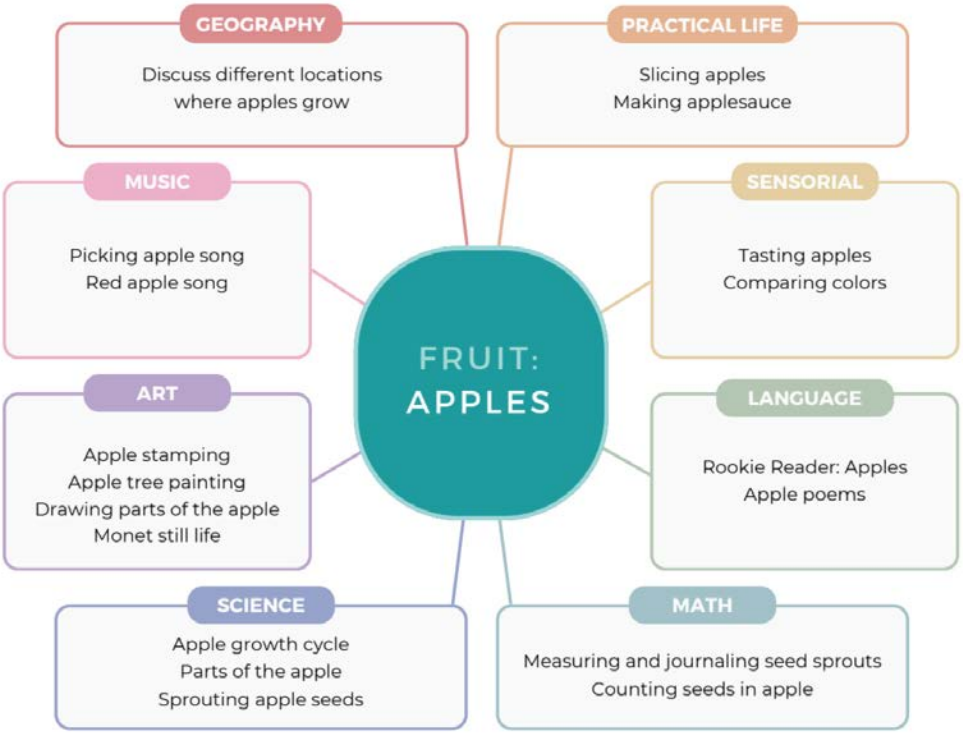
		Matching Flags to their Countries		
		Introduction to the Parts of a Flag		
	Biomes of the Earth			
	Environmental Impact			

Samples of Montessori Integrated Theme Units






INDUSTRIES:
THE FARM
GEOGRAPHY
Farming in different regions/climates
Farm-to-table process (books, sequence cards)
PRACTICAL LIFE
Flour sifting
Making butter by hand
MUSIC
Matching animal sound to animal picture
Animals in classical music
SENSORIAL
Animal sound grading - loudest to softest (e.g. cow, duck, rooster, mouse)
Smooth and rough - animal hair/fur
ART
Drawing farm animals
Fruit/vegetable prints
Painting with tractors/making tractor prints
LANGUAGE
Parts of different farm animals - pig, chicken, cow
Farm songs such as Old MacDonald and poems such as Baa, Baa, Black Sheep
SCIENCE
Matching animal print to animal
Vegetables grown in farms
Fruits grown in farms
MATH
Counting sets of objects/pictures of different farm animals
Sorting and counting fruits and vegetables


FRUIT:
APPLES
GEOGRAPHY
Discuss different locations where apples grow
PRACTICAL LIFE
Slicing apples
Making applesauce
MUSIC
Picking apple song
Red apple song
SENSORIAL
Tasting apples
Comparing colors
ART
Apple stamping
Apple tree painting
Drawing parts of the apple
Monet still life
LANGUAGE
Rookie Reader: Apples
Apple poems
SCIENCE
Apple growth cycle
Parts of the apple
Sprouting apple seeds
MATH
Measuring and journaling seed sprouts
Counting seeds in apple

Encompass Continuum Elementary Universe Studies.xlsx

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

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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

Prelude to the Winds

Middle Series

Air Occupies Space
Warmer Air Moves Upward

Later Series

Heated Air Rises and Cool Air Takes its Place
Winds
Air Insulates
Wind is Moving Air Which Circulates in a Pattern
Global Winds
Deflections and Names of Some Planetary Winds
Interactions of Heated Land/Water and Wind (Sea/Land breeze)

Interaction of Heated Land/ Water and Wind

Changing Seasons and Winds
Work Chart of the Winds

Rain

Water Vapors
Water Condenses
Seasonal Rain
Local Conditions for Rain
Coastal Rain
Tropical Rain
Orographic Rain

Ocean Currents

Air Can Make Water Surface Move
Land Causes the Currents to Turn
Water Rises as it is Heated
Ocean Currents

Wind Erosion

Work of Water

Skills Inventory

Lower Elementary

Identifies bodies of water and understands that water exists as a solid (ice) and liquid form. Understands that water can change the shape of land.

Explains ways in which natural disasters may impact people.

Upper Elementary

Understands where fresh and salt water are found and identifies different types of water erosion and how water shapes landforms.

Understands how water impacts ecosystems and organisms found in different regions and how the oceans influence the climate.

Initial Series	Middle Series	Later Series
The River		
	River Model	
	Parts of a River	
	Sedimentation	
	River Flows from Highlands to Lowlands	
	Rivers of the Child's Own Continent and Main Rivers of the Earth	
Erosion		
	By Water	
	By Rain	

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By Waves
By Ice

The Water Cycle

Earth Science

Saltwater and Freshwater

Impact on Living Things

Climate

Natural Disasters

Natural Disasters

Natural Disasters

Human Impacts

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		
	Crystallization		
States of Matter			
	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		

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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		

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Relationship between Objects

Electric and Magnetic Forces

Motion Patterns

Relationship between Objects

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	Middle 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	

Encompass Continuum Elementary Life Science.xlsx

		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	

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Monocotyledons and Dicotyledons

Plant Classification

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 Classi#cation
		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 di☼erent 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
	The Great River	
	Humans are Mammals	
	Cells	
Senses		

Sight
Hearing
Smell
Taste
Touch

Body Systems

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

Basic Needs of Living Things
Adaptations of Living Things
Seasons

Middle Series

Natural Resources
Introductory Biome Studies

Later Series

From Biosphere to atoms
Characteristics of Biomes
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

Inca
Ancient Greece
Rome
Medieval Europe
Life on Earth
The Spread of Vegetation
Vegetation in Different Zones
Location of Cities in North America
Migrations of People
The Story of Humans Migrating
Drying of the Deserts, Movement of the Glaciers
The Hunt: Following the Herd
Billiard Ball Movement
Nomadic Horde
Infiltration and Fusion
Clearing of the Forest
Breaking the Wall
Seaborne Migration
The Melting Pot vs. Tossed Salad vs. Fusion

Human History

Skills Inventory

Lower Elementary

Identifies significant individuals, groups, events and time periods of their local community, state, and the United States and can compare perspectives and different accounts of the same historical event.

Upper Elementary

Identifies significant individuals, groups, events, and time periods of World History (Western and Eastern Hemispheres) and can explain probable causes and effects of events and developments.

	Initial Series	Middle Series	Later Series
Local Community			
	Urban, Suburban, Rural		
	Democracy		
	Rules and Laws		
	Geography		
Child's Own State			
		Geography	
		Historical Periods	
		Government	
United States History			
		Indigenous Americans	
		European Exploration	
		Colonial Times	
		Independence and Expansion	
		Reform and Reconstruction	
		New Nation	
		Blank United States History Timeline	

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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	Middle Series	Later 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		

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	Middle Series	Later Series
Economics		
Scarcity		
Costs and Benefits		
Goods and Services		
Consumers and Producers		
Banks		
Saving and Borrowing		
	What is Produced and Where?	
	How Much is Produced?	

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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
Profits
Financial Institutions
Interest Rates
Inflation & Deflation
Unemployment
Goods and Services
Human Capital
Economic Interdependence

Human Interdependencies

Where do we Get our Food?
What does the Farmer Produce?
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		

	Joining letters		
	Writing capital letters		
	Calligraphy and Lettering		
Fluent Reading Activities			
		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
Presentation Skills			
	Oral Reports Speeches Poetry Songs Drama Debates	Oral Reports Speeches Poetry Songs Drama Debates	Oral Reports Speeches Poetry Songs Drama Debates
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

			Present an Opionon
			Present claims and findings
			Main Idea or Theme
			descriptions
			facts
			details
Multimedia Components			
	Visual Displays	Visual Displays	Visual Displays
	Audio Recordings	Audio Recordings	Audio Recordings
	Drawings		
			Graphics
			Images
			Music
			Sound
Delivery		Effective Presentation Delivery	Effective Presentation Delivery
	Formal English	Formal English	Formal English
	Volume	Volume	Volume
		Pronunciation	Pronunciation
		Pace	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

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	Present Tense Past Tense Future Tense		
		Perfect Tenses Progressive Tenses	
			Continuous Tense Perfect Continuous Tense Vocabulary
	Vocabulary		
		Transposition Advanced Verb Study Auxillary Verbs Modal Verbs	
			Advanced Verb Study Auxillary Verbs Modal Verbs Transitive/ Intransitive Active/ Passive Voice Mood of the Verb Negative Form of the Verb
		Reflexive Pronouns and The Verb	
			Person, Number, Tense Analyzing Sentences Composing Sentences from a Pattern Composed Grammar Symbols Transitive Verb Intransitive Verb Auxillary Verb Linking Verb Infinitive Participle Gerund
Preposition			
	Oral Introduction Preposition Grammar Boxes Preposition Command Cards		
		Prepositional Phrases Transposition	
			Transposition
Adverb			
	Oral Introduction Adverb Grammar Boxes Adverb Command Cards Vocabulary		
		Comparative, Superlative and Relative Adverbs Transposition Function of Adverbs Manner	

Degrees
Place
Time
The Chart of Gears and the Study of the Adverb

Pronoun

Oral Introduction
Pronoun Grammar Boxes
Pronoun Command Cards
Pronoun Charts 1 and 2
Types of Pronouns
Personal
Possessive
Indefinite
Reflexive

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	Circle and Arrow Material	
	Subject and Predicate		
	Subject, Predicate, Direct Object		
	Compound Subject		
	Compound Predicate		
	Compound Direct Object		
	Indirect Object		
		Attributives	
		Appositives	
		Adverbial Modifiers	
		Direct Address	
		Elliptical Constructions	
		Inverted Word Order	
		Personal Pronouns	
		Linking Verbs	
		Participles	
		Infinitives	
		Gerunds	
			Chart A: Analysis of Simple Sentences with Action Verb
			Grammar Symbols and Logical Analysis Comparison
			Paper Only: Writing Analysis
Clause 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
			Homophones
			Homonyms
Spelling			
	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
	Personal Dictionary	Personal Dictionary	Personal Dictionary
Vocabulary			
	Context Clues	Context Clues	Context Clues
	Meaning of words or phrases using:	Meaning of words or phrases using:	Meaning of words or phrases using:
	Sentence-level context	Sentence-level context	
		Definitions	
		Examples	
		Restatements	
			Cause/effect relationships
			Comparisons in text
			Overall meaning of sentence
			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	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
			Part/Whole
			Items/Category
	Grammar	Grammar	Grammar
	Grammar Boxes	Grammar Boxes	
	Command Cards	Command Cards	
	Grammar in Writing	Grammar in Writing	Grammar in Writing
		Advanced Grammar Symbols	Advanced Grammar Symbols
		Figurative Language	Figurative Language
		Similes	Similes
		Metaphors	Metaphors
		Idioms	Idioms
		Adages	Adages
		Proverbs	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	

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	Fantasy	Fantasy	
			Historical Fiction
			Mysteries
			Science Fiction
			Allegories
			Parodies
			Satire
			Graphic Novels
Dramas			
	Dramatic Productions	Dramatic Productions	Dramatic Productions
	Readers Theater	Readers Theater	Readers Theater
	Monologues	Monologues	Monologues
	Interpretive Reading Cards	Interpretive Reading Cards	Interpretive Reading Cards
	Staged Dialogue	Staged Dialogue	
	Brief Familiar Scenes	Brief Familiar Scenes	
			One-act and Multi-act Plays
			Written Form
			On Film
Poetry			
	Narrative Poem	Narrative Poem	Narrative Poems
	Free Verse Poem	Free Verse Poem	Free Verse Poems
	Nursery Rhymes	Nursery Rhymes	
	Limerick	Limerick	
			Lyrical Poems
			Sonnets
			Odes
			Ballads
			Epics
Literary Nonfiction and Historical, Scientific, and Technical Texts			
	Books about History	Books about History	Historical Accounts
	Science	Science	Scientific Accounts
	Technical Texts	Technical Texts	Technical Account
	Directions	Directions	
	Forms	Forms	
	Biographies	Biographies	
	Autobiographies	Autobiographies	
	Social Studies	Social Studies	
	Arts	Arts	
	Information Displays	Information Displays	
	Graphs	Graphs	
	Charts	Charts	
	Maps	Maps	
	Digital Sources on a Range of Topics	Digital Sources on a Range of Topics	

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		Navigating and Analyzing Text Features and Search Tools
	Visual elements contribute to and clarify text	Visual elements contribute to and clarify text	Visual elements contribute to and clarify text
	characters		
	setting		
	events		
	key ideas		
	Plot		
		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

`

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

Text Features

Bold Print
Captions
Electronic Menus
Glossaries
Headings
Icons
Indexes
Subheadings
Tables of Contents

Navigating and Analyzing Text Features and Search Tools
Animations
Charts
Diagrams
Graphs
Hyperlinks
Interactive Elements on Web Pages
Key Words
Sidebars
Timelines

Navigating and Analyzing Text Features and Search Tools

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

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	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
Story Elements			
	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	

compare and contrast
differences in focus
information

Narrator's/ Speaker's point of view
influence on events
author's development
Author's point of view
Multiple accounts of same event/topic
similarities
differences

Connection

Making Connections Within Texts
Making Connections AcrossTexts

Connection between a series of:
historical events
scientific ideas/ concepts
steps in technical procedure
Connection between two:
individuals
events
ideas
pieces of information

Making Connections Within Texts
Making Connections Across Texts
Describe relationshiip (including what happened and why) between a series of:
historical events
scientific ideas/ concepts
steps in technical procedure

Making Connections Within Texts
Making Connections Across Texts
Explain the relationshps or interactions between two or more concepts/ individuals/ events/ ideas in:
historical text
scientific text
technical text

Analyze how an individual/ event/ idea is:
introduced

illustrated
elaborated

Reading Comprehension: Evaluation and Questioning

Skills Inventory

Lower Elementary

Asks and answers questions about text in books, text read aloud and information presented in diverse media and formats (visually, quantitatively and orally). Refers to important points and key details when writing or speaking about a text.

Upper Elementary

Interprets and evaluates information presented in text as well as diverse media and formats (visually, quantitatively and orally). Identifies evidence and reasoning used to support claims and cites textual evidence.

Questioning, Inference, and Interpretation

Initial Series

Question-Answer Relationship
In the Book, and In My Head

Ask and answer questions
demonstrate understanding
who
what

Middle Series

Question-Answer Relationship
Author and Me and On My Own
Think and Search

Ask and answer questions
demonstrate understanding

Later Series

Question-Answer Relationship

Think and Search

Questioning the Author

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	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	Self Monitoring	Self Monitoring
	Visualizing While Reading	Visualizing While Reading	Visualizing While Reading
Evaluate Presented Information			
	Text Read Aloud	Text Read Aloud	
	key details/ key ideas		
	ask questions		
	answer questions		
	recount		
	describe		
		main idea	
		supporting details	
		paraphrase	
		reasons	
		evidence	
			Summarize
	Oral Presentation		
	key details/ key ideas		
	ask questions		
	answer questions		
	recount		
	describe		
	Other Media	Diverse Media and Formats (visual, quantatative, oral)	Diverse Media and Formats (visual, quantatative, oral)
	key details/ key ideas	main idea	
	ask questions		
	answer questions		
	recount		
	describe		
		supporting details	
		paraphrase	

		reasons evidence	reasons evidence summarize interpret explain
	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	Ask and Answer Questions of speaker to: offer elaboration offer appropriate detail	 Arguments and Claims Delineate arguments and claims claims supported by resons claims not supported by reason
	Reciprocal Teaching	Reciprocal Teaching	Reciprocal Teaching
Literary Comparisons			
	Compare and Contrast adventures of characters expereinces of characters 2 or more versions of the same story by different authors from different cultures	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	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

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	compare and contrast	compare and contrast	compare and contrast
	most important points	most important points	
		key details	
			authors' presentations of events
		Integrate Information	
		to write	to write
		to speak	to speak
Argument and Reasoning			
	Supporting points in text	Supporting points in text	Supporting points in text
	Author's reasons	Author's reasons	Author's reasons
		Author's evidence	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: time/chronological	Text Structure: time/chronological
	Text Structure: sequence	Text Structure: sequence	Text Structure: sequence
	Text Structure: cause/effect	Text Structure: cause/effect	Text Structure: cause/effect
	Text Structure: problem and solution	Text Structure: problem and solution	Text Structure: problem and solution
	Text Structure: descriptive	Text Structure: descriptive	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	Range of genres	
	explain differences		
		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	Overall Structure
		events	

		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	Activating Background Knowledge	
	Concept Mapping	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		
		Titles	
Punctutation			
	End Punctuation		

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Commas			
	Dates		
	Words in a Series		
	Greetings and Closings of Letters		
		Addresses	
		Dialogue	
		Compound Sentence	
			Items in a Series
			Sentence Introduction
			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

	Linking and Transition Words	Linking and Transition Words	Linking and Transition Words
Technology			
	Exploring Digital Tools for Writing and Publishing Produce writing Publish writing Collaborate with peers.	Exploring Digital Tools for Writing and Publishing Produce writing Publish writing Collaborate with peers. Interact with peers Gather information Keyboarding skills Minimum of one page	Exploring Digital Tools for Writing and Publishing Produce writing Publish writing Collaborate with peers. Interact with peers Gather information Keyboarding skills Minimum of two pages
Range of Writing			
		Write for a range of discipline-specific: tasks purposes audiences Write over: extended time frames shorter time frames	Write for a range of discipline-specific: tasks purposes audiences Write over: extended 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 feature article editorial speech Clear and coherent writing development organization	Types of Writing: letter feature article editorial speech Clear and coherent writing development organization style
Purpose			
		Types of Writing: argue narrate an event inform Clear and coherent writing	Types of Writing: argue narrate an event inform Clear and coherent writing

		development	development
		organization	organization
			style
Audience			
		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.

	Initial Series	Middle Series	Later Series
Planning			
	Brainstorming	Brainstorming	Brainstorming
	Outlining	Outlining	Outlining
Revising			
	Rough Drafts	Rough Drafts	Rough Drafts
	Giving and Receiving Feedback	Giving and Receiving Feedback	Giving and Receiving Feedback
	The Mini Lesson	The Mini Lesson	The Mini Lesson
	Student Centered Writing Conferences	Student Centered Writing Conferences	Student Centered Writing Conferences
Editing			
	Editing	Editing	Editing
	Editing Marks	Editing Marks	Editing Marks
Publishing	Publishing	Publishing	Publishing

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.

	Initial Series	Middle Series	Later Series
Formal and Informal English			
	Speaking and Listening	Speaking and Listening	Speaking and Listening
	Writing	Writing	Writing
	Reading	Reading	Reading
Grammar Symbols			
		Grammar Symbols for Student’s Writing	
		Grammar Symbols for Other Authors	
Writing: Punctuation			

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	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	Transformation
	Purposeful Sentence Writing	Purposeful Sentence Writing
	Expanding Sentence Beginnings	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	Introduction	Introduction
	Developing the Topic	Developing the Topic	Developing the Topic
	Conclusion	Conclusion	Conclusion
Organizational Elements			
	Definition	Definition	Definition
		Formatiing	Formatting
		Graphics	Graphics
		Multimedia	Multimedia
		Quotations	Quotations
			Classification
			Comparison/ Contrast
			Cause/ Effect
Words and Phrases			
		Words	Words
		Phrases	Phrases
			Clauses
		Precise language	Precise language
		Domain-specific vocabulary	Domain-specific vocabulary
		Link ideas	Link ideas
		within categories of information	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

		Sensory Language	Sensory Language
		Concrete Words & Phrases	
			Precise Words
			Descriptive Details
		Sequence	Sequence
		Experiences	Experiences
		Events	Events
			Time frame shifts
			Settings shifts

Genres of Writing: Research

Skills Inventory

Lower Elementary

Conducts short research projects that build knowledge through investigation of a topic.

Upper Elementary

Conducts short research projects that build knowledge through investigation of different aspects of a topic and draws on several sources.

	Initial Series	Middle Series	Later Series
Research Process			
	Intorduction to the Research Process	Intorduction to the Research Process	Intorduction to the Research Process
	Writing Research Questions	Writing Research Questions	Writing Research Questions
	Research and Note taking from different sources	Research and Note taking from different sources	Research and Note taking from different sources
	Organizing and Writing a Research Paper	Organizing and Writing a Research Paper	Organizing and Writing a Research Paper

Genres of Writing: Poetry

Skills Inventory

Lower Elementary

Writes different types of poems, demonstrating understanding of the different elements (structure, sound patterns) for each type.

Upper Elementary

Writes different types of poems, demonstrating understanding of the different elements (structure, sound patterns) for each type.

Elements of Poetry			
	Structure	Structure	Structure
	Sound Patterns	Sound Patterns	Sound Patterns
Types of Poems			
	Acrostic		
	Cinquain		
	Concrete Poem		
	Nursery Rhyme		
	List Poem	List Poem	
		Sonnet	Sonnet
		Limerick	Limerick
		Clerihew	
		Free Verse	Diamante
		Haiku	

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	

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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			
	Bead Frame		
10 More or 10 Less			
	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			
	Greater Than, Less Than, Equal To	Greater Than, Less Than, Equal To	
Reading and Writing Numbers			
	Bead Frame	Building the Checkerboard	

Expanded Form

Rounding

Ten times More

Ten Times More and 1/10 Less

Infinity Street

Bank Game

Stamp Game

Numer Line

Golden Mat

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		
	Bead Bars and Operations Tickets	
Problem Solving		
	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

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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

No Facts
With Fact

Checkerboard

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

Teacher-Created or Purchased Cards
Experiences in the Classroom
Geometric Form of Multiplication
Cross Multiplication
Multiplication Algorithm

Division

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
Recording
Simple Recording
Record Problem, Quotient, Remainder
Record Intermediate Remainders, Quotient, Final Remainder
Record What has been used, Intermediate Remainders, Quotient, Final Remainder

Unknown Numbers

Bead Bars and Operations Tickets

Problem Solving

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		

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	Control of Error		
	Two by Two		
	Subtraction Strip Board		
	Using the Tables		
	Exploration		
	How Many Ways?		
	Cut Combinations		
	Subtraction Chart		
	Whole Board		
	Blank Board		
	Chart of Differences		
	Fluency	Fluency	
Multiplication			
		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	
Division			
		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		

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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		

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Quantities, Names & Symbols
Mixed Numbers & Fractions Greater than one

Fractions as Part of a Set

Fractions as Part of a Set

Equivalent Figure Material

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		
Equivalency of Fractions	Equivalency of Fractions	
Equivalent Figure Material		
Metal Square: nine plates	Metal Square: nine plates	
Metal Triangles: four 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		

Addition
Subtraction

Transparencies

Operations beyond Simple Cases
Addition and Subtraction: Alternate Methods for Finding Common Denominators

Problem Solving

Teacher-Created or Purchased Cards
Experiences in the Classroom

Teacher-Created or Purchased Cards
Experiences in the Classroom

Paper

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.

Initial Series	Middle Series	Later Series
Fraction Circles		
Operations, Simple Cases Multiplication by a Whole Number		
	Operations beyond Simple Cases Multiplication by Whole Number: Sensorial	Operations beyond Simple Cases Multiplication by Fraction: Sensorial
Paper		
		Operations beyond Simple Cases Multiplication by Fractions using Graph Paper Multiplication by Fractions: Passage to Abstraction
Problem Solving		
	Teacher-Created or Purchased Cards Experiences in the Classroom	Teacher-Created or Purchased Cards 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	Addition Using Decimal Board
	Subtraction Using Decimal Board	Subtraction Using Decimal Board
	Multiplication by Unit Multiplier 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 de!ning 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			

Encompass Continuum Elementary Geometry.xlsx

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

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

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

Encompass Continuum Elementary Geometry.xlsx

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

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

Geometric Figures: Relationships of Geometric Figures

Skills Inventory

Lower Elementary

Identifies congruent, similar and equivalent figures.

Initial Series	Middle Series	Later Series
Equivalent Figure Material		
Congruent Figures		
Similar Figures		
Equivalent Figures		
Construction Triangles	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		
	Reasoning	
	A Longer Chain of Reasoning	
Constructive Triangles and Metal Insets		
	Metal Fraction Materials Cabinet	
	Equivalence at the Sensorial Level	
	Equivalence at the Reasoning Level	

Geometric Figures: Measurement of Geometric Figures

Skills Inventory

Encompass Continuum Elementary Geometry.xlsx

Lower Elementary

Understands the concepts of area and perimeter and how they relate to addition and multiplication.

Understands the concept of and 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.

Initial Series	Middle Series	Later Series
Angles		
	Measuring Angles	
	The Story of Angles	
	Measurement of an Angle	
	Using the Montessori Protractor	
	Using a Protractor	
	Adding and Subtracting Angles	
	Sensorial Calculation of Circumference	
	Problem Solving	
	Teacher-Created or Purchased Cards	
	Experiences in the Classroom	
Area of Plane Figures		
	Equivalent Figure Material and Yellow Area Material	Equivalent Figure Material and Yellow Area Material
	Concept of Area	
	Area of a Rectangle	
	Perimeter	
	Formula of Area	
		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
	Problem Solving	Problem Solving
	Teacher-Created or Purchased Cards	Teacher-Created or Purchased Cards
	Experiences in the Classroom	Experiences in the Classroom
Area of Solids		
		Geometric Solids
		Surface Area
		Polyhedra
		Cone
		Problem Solving
		Teacher-Created or Purchased Cards

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

Pythagorean Theorem: Plate III

Pythagorean Theorem Applied to Other Figures

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

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.	*How can understanding Newton's laws and the interplay of forces guide the creation of innovative solutions to real-world challenges involving motion?* *What can we learn about the fundamental relationships between motion, mass, and force by carefully analyzing experimental data?* *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?*	7.P.1 Understand motion, the effects of forces on motion and the graphical representations of motion. *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.* *7.P.1.2 Explain the effects of balanced and unbalanced forces acting on an object (including friction, gravity and magnets).* *7.P.1.3 Illustrate the motion of an object using a graph to show a change in position over a period of time.* *7.P.1.4 Interpret distance versus time graphs for*	

		constant speed and variable motion.	
		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.	*How can we use models to visualize and predict the transformations that occur during chemical reactions and changes in the structure of matter?* *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?* *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?*		8.P.1 Understand the properties of matter and changes that occur when matter interacts in an open and closed container. *8.P.1.1 Classify matter as elements, compounds, or mixtures based on how the atoms are packed together in arrangements.* *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.* *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.* *8.P.1.4 Explain how the idea of atoms and a balanced chemical equation support*

			the law of conservation of mass.
		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.	*How can we model the dynamic interplay between kinetic and potential energy to predict and explain the behavior of physical systems?* *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?* *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?* *How do we effectively define the essential criteria and constraints of a design problem to ensure the development of a relevant and achievable solution?* *What systematic processes and data analysis techniques can we employ to objectively evaluate and compare the effectiveness and*	7.P.2 Understand forms of energy, energy transfer and transformation and conservation in mechanical systems. *7.P.2.1 Explain how kinetic and potential energy contribute to the mechanical energy of an object.* *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).* *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.*	8.P.2 Explain the environmental implications associated with the various methods of obtaining, managing, and using energy resources. *8.P.2.1 Explain the environmental consequences of the various methods of obtaining, transforming and distributing energy.* *8.P.2.2 Explain the implications of the depletion of renewable and nonrenewable energy resources and the importance of conservation.*

	efficiency of different design solutions? *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?*	*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.*	
		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.	*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?* *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?* *How can we use scientific evidence to explain the causes and consequences of changes within Earth's dynamic systems, and what implications do these*	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. *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.* *7.E.1.2 Explain how the cycling of water in and out of*	8.E.1 Understand the hydrosphere and the impact of humans on local systems and the effects of the hydrosphere on humans. *8.E.1.1 Explain the structure of the hydrosphere including: water distribution on earth; local river basins and water availability.* *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*

	changes have for the planet and its inhabitants? *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?* *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?* *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?*	*the atmosphere and atmospheric conditions relate to the weather patterns on Earth.* *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.* *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.* *7.E.1.5 Explain the influence of convection, global winds and the jet stream on weather and climatic conditions.* *7.E.1.6 Conclude that the*	*in the marine environment, value and sustainability of marine resources, deep ocean technology and understandings gained.* *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.* *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.*

		good health of humans requires: monitoring the atmosphere, maintaining air quality and stewardship.	
		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.	*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?* *What does the analysis of data regarding solar system objects reveal about their scale, properties, and relationships within our cosmic neighborhood?* *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?*		8.E.2 Understand the history of Earth and its life forms based on evidence of change recorded in fossil records and landforms. *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).* *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.*
		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.	*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?* *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?* *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?*	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: Euglena, Amoeba, Paramecium, and Volvox.* *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.*

		that these systems interact with each other to sustain life.	
		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.	*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?* *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?* *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?*		8.L.3 Understand how organisms interact with and respond to the biotic and abiotic components of their environment. *8.L.3.1 Explain how factors such as food, water, shelter and space affect populations in an ecosystem.* *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* *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).*

		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.	*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?* *How can we use models, scientific principles like natural selection, and mathematical representations to explain the mechanisms driving evolutionary change in populations over time?* *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?* *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?* *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?*	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.*

	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?		
		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.	*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?* *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?* *Considering the diverse nutritional needs of different organisms (including plants), how does the chemical composition of their food*		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. *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).* *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).*

	sources enable them to obtain the energy and building materials necessary for their specific life functions, growth, and survival?		

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.

Montessori 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

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Assessment Vocabulary

array	line	Cognitive Verbs
circle	number	answer
compare	number name	arrange
count	number order	compare
equal	ones	identify
greater than (>)	pair	present
group/grouping	quantity	refer
how many	rectangular array	represent
large/larger	represent	understand
number name	zero	
less than (<)		

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

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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.

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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*

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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.

Montessori 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).

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○ 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 (<)	Cognitive Verbs
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)

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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)

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*

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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

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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 (÷) 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.

Assessment Vocabulary

addition equation expression	represent subtraction	Cognitive Verbs 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*

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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	number	Cognitive Verbs
addition	ones	act out
compose	pair	answer
decompose/decomposition	represent	compose
equal	subtract	understand
equation	subtraction	decompose
expression	word problem	record
less than (<)		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)

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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.

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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*

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Whole Number Operations: Memorization

Skills Inventory
Identifies the essential combinations of math facts in all four operations using the Montessori manipulatives leading to fluency.

Montessori 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

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• 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*

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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.

Montessori 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.

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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.

Montessori 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.

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Communication

Reasoning and Explaining

Through collaboration, the Montessori math curriculum provides students with opportunities to explain their reasoning for their thinking and next straps.

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

Common Core Standards for Mathematical Practice

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?"

Examples:

- 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 *Common Core Standards for Mathematical Practice*

Notes

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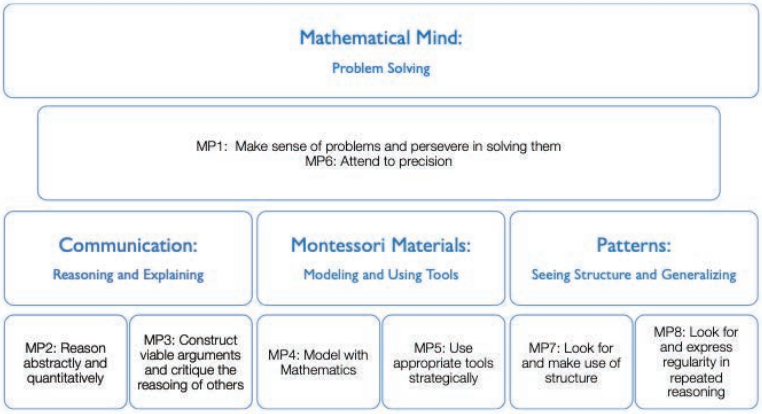
What are the Standards for Mathematical Practice:
The Standards for Mathematical Practice are 8 standards that allow students to understand and apply mathematics with confidence. These standards include problem solving, reasoning and explaining, modeling and using tools, and seeing patterns and structures.



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

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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

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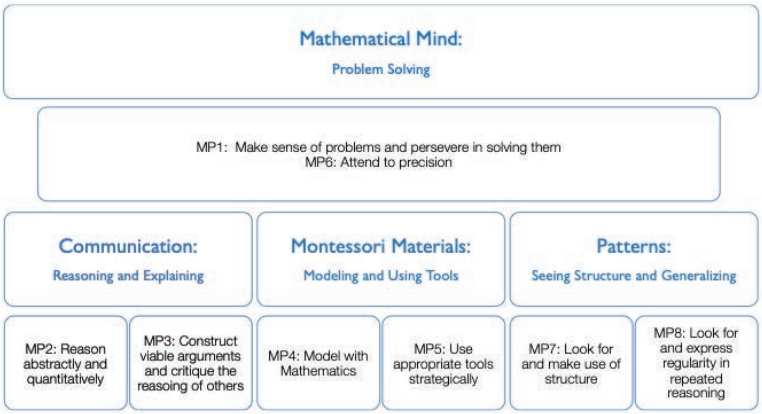
Standards	
CCSS.MATH.PRACTICE.MP1	Make sense of problems and persevere in solving them.
CCSS.MATH.PRACTICE.MP6	Attend to precision.

Based on *Common Core Standards for Mathematical Practice*

Notes

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]
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)

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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 visuationat 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

Common Core Standards for Mathematical Practice

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.

Examples:

- 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

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- 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

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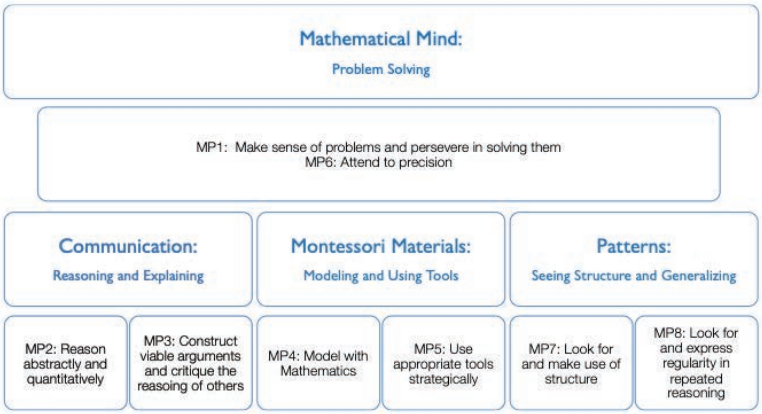

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Sensorial Materials: The sensorial materials were created to help young children in the process of creating and organising their intelligence. Each scientifically designed material isolates a quality found in the world such as colour, size, shape, 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

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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

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Practical Life

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Language

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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

Common Core Standards for Mathematical Practice

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?"

Examples:

- 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*

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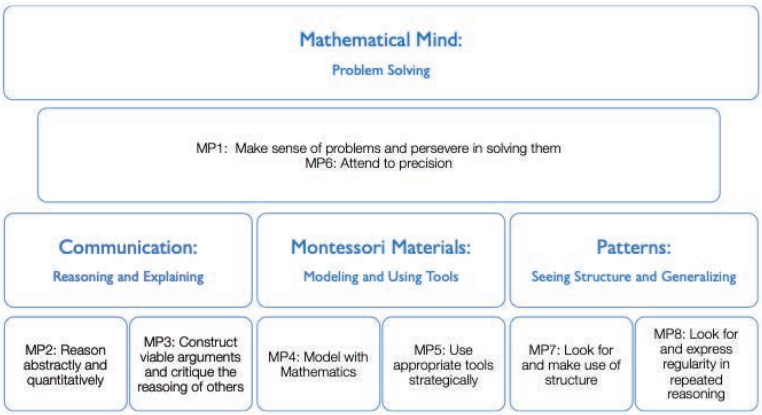

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2027/28 School Calendar

August 2027						
Su	Mo	Tu	We	Th	Fr	Sa
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 2027						
Su	Mo	Tu	We	Th	Fr	Sa
			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 2027						
Su	Mo	Tu	We	Th	Fr	Sa
					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 2027						
Su	Mo	Tu	We	Th	Fr	Sa
	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				

December 2027						
Su	Mo	Tu	We	Th	Fr	Sa
			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 2028						
Su	Mo	Tu	We	Th	Fr	Sa
						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 2028						
Su	Mo	Tu	We	Th	Fr	Sa
		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				

March 2028						
Su	Mo	Tu	We	Th	Fr	Sa
			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	

April 2028						
Su	Mo	Tu	We	Th	Fr	Sa
						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 2028						
Su	Mo	Tu	We	Th	Fr	Sa
	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 2028						
Su	Mo	Tu	We	Th	Fr	Sa
				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	

July 2028						
Su	Mo	Tu	We	Th	Fr	Sa
						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					

First Day of School
Setup/Takedown days
Teacher Work Days

Federal Holidays
Vacation Days
Last Day of School

Total Days	188
Total Hours	1034

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 (120 mins)	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

	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				

Position	Year 0	Year 1	Year 2	Year 3
Principal/School Leader		1		
Assistant Principal		0		
Dean(s)		0		
Additional School Leadership		1		
Core Classroom Teachers		0		
Specialized Classroom Teachers (e.g. special education, ELL, foreign language, etc.)		0		
Student Support Positions (e.g. social workers, psychologists, etc.)		0		
Specialized School Staff		0		
Teaching Aides or Assistants		0		
School Operations Support Staff		0		

Year 4 **Year 5**

	Year 1	Year 2
Administrative & Support Personnel		
Lead Administrator	1	1
Assistant Administrator	1	1
Finance Officer	0	0
Clerical	1	1
Custodians	1	1
Total Admin and Support:	4	4
Instructional Personnel		
Core Content Teacher(s)	4	5
Electives/Specialty Teacher(s)	1	2
Exceptional Children Teacher(s)	1	2
Teacher Assistants	4	6

Year 3	Year 4	Year 5
1	1	1
1	1	1
1	1	1
1	1	1
4	4	4

8	10	12
3	4	5
2	2	3
8	10	12

	Year 1	Year 2
Administrative & Support Personnel		
Lead Administrator	1	1
Assistant Administrator	1	1
Finance Officer	0	0
Clerical	1	1
Custodians	1	1
Total Admin and Support:	4	4
Instructional Personnel		
Core Content Teacher(s)	4	5
Electives/Specialty Teacher(s)	1	2
Exceptional Children Teacher(s)	1	2
Montessori Instructional Support Coaches	0	1
Teacher Assistants	4	6

Year 3	Year 4	Year 5
1	1	1
1	1	1
1	1	1
1	1	1
4	4	4

8	10	12
3	4	5
2	2	3
2	3	3
8	10	12

Board Member Name	Board Title	Phone Number	Email Address	County of Residence	Current Occupation	Past or Present Professional Licenses Held	Any disciplinary action taken against any of these professional licenses?
Candace Fletcher	President	256-227-9253	candace.fletcher@public-montessori.org	Anderson, TN	Practicum Coordinator, Instructor and Coach for Montessori Teacher Education Program	Educator License, *Ohio Department of Education* , Grades PK - 3, Reading EndorsementCalifornia Multiple Subject Teaching Creder	None
Carol Pirrello	Secretary	814-823-2680	cpirrello@live.com	Wake, NC	Senior Case Manager - Social Work		None
Sara Suchman	Vice President	203-241-1432	sara.suchman@public-montessori.org	Windham, VT	Executive Director	Connecticut and Virginia State Teaching Licenses: K - 8 and Adult English as a Second Language	None
Katie Brown	Treasurer	949-400-6175	katie.brown@public-montessori.org	Wake, NC	Education Researcher/Teacher Educator	South Carolina Teaching Certificate: English/Language Arts, Grades 6-12, 2012-2015North Carolina Teaching License: English/Langu	None
Stephen Griffin	Member	919-383-0442	steve@inspeople.com	Durham, NC	Entrepreneur/Insurance Agent	Licenses for: property, casualty, life, accident and health insuranceAccredited Advisor in Insurance Designation	

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Office of CHARTER SCHOOLS
NC Department of Public Instruction

Charter School Board Member Information Form

Note: *To be completed individually by each proposed founding charter school board member. Please include a* ***one-page*** *resume with this form and sign by hand.*

Serving on a public charter school board is a position of public trust and as a board member 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, and the school's fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, the State Board of Education requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the applicant team behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

School Information	
Name of charter school	Encompass Montessori Charter School

Board Member's Information	
Board Members	Full name: Stephen Griffin
	Home Address: 4018 Bristol Rd, Durham, NC 27707
	Business Name & Address: Insurance People of North Carolina 1920 Front Street, Suite 750 Durham, NC 27705
	Telephone No.: 919-280-0313

Docusign Envelope ID: 45D02405-96CC-4B94-8ED0-21935C258804

	E-mail address: steve@inspeople.com

Board Member Application	
Have you previously served on a board of a school district, another charter school, a non-public school, or any non-profit corporation?	No: ☐ Yes: X
Educational History	Durham Jordan High School, 1978 HS Diploma University of North Carolina - Wilmington Bachelor of Arts Speech Communication 1982
Employment History	Insurance People of North Carolina Owner 1989 - Present
How were you recruited to join this Board of Directors?	I was recruited by Sherilyn Moore
Why do you wish to serve on the board of the proposed charter school?	I believe in the concept of Montessori, and I believe we need more school choice in North Carolina.
What is your understanding of the appropriate role of a public charter school board member?	The board's role is to govern, be fiscally responsible and advocate for the school. Fundraising and supporting the school leadership is also part of this role.
Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you can be an effective board member.	• Founding board member of Granite Charter Academy • I insure over 200 schools as their insurance agent
Describe the specific knowledge and experience that you would bring to the board.	I am keenly aware that fiscal responsibility and academic success are key elements of a school's survival. I would bring knowledge and

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	experience around ensuring the school is solid in at least these two areas.

School Mission and Program	
What is your understanding of the school's mission and guiding beliefs?	This school intends to do an excellent job in teaching youth to think and solve problems
What is your understanding of the school's proposed educational program?	The hands-on, tactile nature of the learning makes Montessori unique and a great offering for a different choice in schools here in North Carolina.
What do you believe to be the characteristics of a successful school?	A successful school is fiscally sound. Its academic outcomes are strong and show evidence of high performance.
How will you know that the school is succeeding (or not) in its mission?	An evaluation of the school's financial statement and the test scores will let the board know if the school is successful.

Governance	
Describe the role that the board will play in the school's operation.	The board will govern the school effectively and maintain fiscal responsibility.
How will you know if the school is successful at the end of the first year of operation?	Enrollment will be a key indicator – and I recognize it is one of the most difficult things to do. We must engage with the community, getting families to come and get them to stay.
How will you know at the end of five years of the schools is successful?	A strong waitlist will be an indicator of whether or not the school is successful at the end of five years.
What specific steps will the charter school board need to take to ensure that the school is successful?	The board will need to take steps to ensure fiscal responsibility (follow financial statements, act with strong ethics in mind) and academic success (monitor and evaluate scores on assessments and school-based data).

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How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interests of the school?	In the case of a member acting unethically, I would follow protocols for the board member's removal.

Certification

I, Stephen Griffin, certify to the best of my knowledge and ability that the information I am providing to the North Carolina State Board of Education as a prospective board member for **Encompass Montessori Charter School** is true and correct in every respect.

Board Member's Signature

Signature DocuSigned by: Stephen E Griffin 6B52D1B929224F6...	**Date** 4/24/2025

**If you responded within the application that disciplinary action has been taken against any past or present professional licenses, provide a detailed response below outlining the disciplinary action and the license validity.* Click or tap here to enter text.

Office of CHARTER SCHOOLS
NC Department of Public Instruction

Charter School Board Member Information Form

Note: *To be completed individually by each proposed founding charter school board member. Please include a* ***one-page*** *resume with this form and sign by hand.*

Serving on a public charter school board is a position of public trust and as a board member 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, and the school's fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, the State Board of Education requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the applicant team behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

School Information	
Name of charter school	Encompass Montessori Charter School

Board Member's Information	
Board Members	Full name: Sara Suchman
	Home Address: 51A Thayer Ridge Road, Brattleboro, VT 05301
	Business Name & Address: Encompass Montessori 4030 Wake Forest Road, Suite 349 Raleigh, NC 27609
	Telephone No.: (203) 241-1432

	E-mail address: sara.suchman@public-montessori.org

Board Member Application	
Have you previously served on a board of a school district, another charter school, a non-public school, or any non-profit corporation?	No: ☐ Yes: ✔
Educational History	**Harvard University Graduate School of Education, MA** *EdD, Educational Policy, Leadership, and Instructional Practice* June 2012 **Stanford University Graduate School of Business, CA** *MBA* May 1996 **School for International Training, VT** *MAT in English as a Second Language* May 1990 **Williams College, MA** *Bachelor of Arts, Psychology* May 1986
Employment History	**National Center for Montessori in the Public Sector, Remote** *Co-founder and Executive Director* June 2012 - present **Harvard Graduate School of Education, Cambridge, MA** *Instructor, Student-Teacher Supervisor, Teaching Assistant, Instructional Designer* August 2003 - May 2012 **Cambridge-Harvard Summer Academy, Cambridge, CA** *Director* Summers 2005, 2006, 2009

	Exploration Senior Program at Yale, New Haven, CT *Director of Curriculum* *Summers 2002, 2004* **St. Matthew's Episcopal Day School, San Mateo, CA** *Assistant Head of School and Middle School Director; Algebra Teacher* July 1996 - June 2001 **Fairfax County Public Schools, Fairfax, VA** *Middle School ESL teacher; Lead Teacher* August 1990 - June 1993
How were you recruited to join this Board of Directors?	I was recruited to this board of directors through conversations with a parent local to the area who saw a need for a public Montessori. She approached me because of my role at the National Center for Montessori in the Public Sector (NCMPS). NCMPS works for more and better public Montessori options throughout the country, and I do this work because I am passionate about it. I was on the founding and governing boards of Breakthrough Montessori Public Charter School in Washington, DC and was ready to jump in again to create another amazing public Montessori option.
Why do you wish to serve on the board of the proposed charter school?	It is an honor to be part of an effort to bring more public Montessori to a community that does not already have access to it. It is also a responsibility. Because of my experience in public Montessori and with other charter schools (as Board member and informal advisor), I am prepared for and ready for this responsibility. It sits at the nexus of my personal and professional passion. It is deeply important to me that every community have access to public Montessori and that this educational option be strong and well run in a way that serves children, families, and the community and proves the strength of the model.

What is your understanding of the appropriate role of a public charter school board member?	The appropriate role of a public charter school board member is to provide strategic governance and oversight, not to manage day-to-day operations. Board members are responsible for setting the school's mission, vision, and policies, and for ensuring the school remains faithful to its charter. They hold the executive director accountable for academic, financial, and operational performance, while also ensuring compliance with applicable laws and the charter agreement. Charter board members also serve as stewards of public funds, approving budgets, monitoring financial health, and making decisions that support the school's long-term sustainability. They represent and advocate for the school within the broader community, helping to build strong relationships and ensuring that the school responds to the needs of its students and families. Above all, board members are expected to act with integrity, avoid conflicts of interest, and make decisions that prioritize student success.
Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you can be an effective board member.	I was a founding Board member of the Breakthrough Montessori Public Charter School in Washington, DC and then proceeded to spend the maximum of two 3-year cycles on the governing board. During that time of rapid and exciting growth, I served as the Board Secretary, chair of the Academic Committee, and led two Executive Director searches.
Describe the specific knowledge and experience that you would bring to the board.	The knowledge and experience I bring to the board includes: ● 13 years working with publicly funded district, magnet, and charter Montessori schools from idea conception and design through start-up and implementation. ● Charter Board experience (see above) ● Budget, performance evaluation, and fundraising experience as a non-profit Executive Director

	• Teacher coaching and support as a school leader

School Mission and Program	
What is your understanding of the school's mission and guiding beliefs?	Encompass' mission is to provide Wake County 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. Its guiding belief is that every child, family, and community should have access to schools and an educational experience that sees every child's full potential and in which every child can flourish academically, socially, and emotionally. Encompass Montessori sees the Montessori method as the best pedagogical model and school culture for providing this learning environment.
What is your understanding of the school's proposed educational program?	Encompass will offer a fully implemented Montessori program that aligns with the NCSOS.
What do you believe to be the characteristics of a successful school?	A successful school sees every child, no matter their background, for their full whole selves and the potential they have to do amazing things in this world. A successful school shows respect to all and offers the opportunity to grow intellectually, emotionally, and socially within a supportive community. It creates an environment where every child feels known, challenged, and deeply valued.

How will you know that the school is succeeding (or not) in its mission?	We will know the school is succeeding when our students walk through the doors each day with curiosity, confidence, and a sense of belonging. When families tell us their children feel seen and supported, when teachers know their students deeply and can speak to their growth not just in academics but in character and community, we'll know we're on the right path. We'll see success in classrooms where learning is alive — where children are engaged, independent, and joyful in their work. We'll also be honest about where we're falling short, listening closely to feedback, disaggregating data, and reflecting as a team. A mission-driven school is one that holds a mirror up to itself and adapts — always asking whether we are truly serving all children with equity, dignity, and excellence.

Governance	
Describe the role that the board will play in the school's operation.	The Board's role is to ensure the school stays true to its mission, meets academic and financial goals, and complies with laws and regulations. The Board of Directors will be responsible for hiring and supervising the school Executive Director and will support the ED and other members of the leadership team in making strategic decisions.

How will you know if the school is successful at the end of the first year of operation?	Success at the end of Encompass Montessori's first year looks like a joyful, engaged community of students, families, and staff who feel connected to the school's mission and values. Classrooms are vibrant with purposeful, independent learning; students demonstrate growth not just academically but socially and emotionally; and a strong foundation of trust, communication, and partnership is built with families. The school will have met its initial academic and operational benchmarks, maintained financial stability, and established a culture of reflection and continuous improvement, setting the stage for sustainable growth and deeper impact in the years ahead.

How will you know at the end of five years if the school is successful?	At the end of five years, Encompass Montessori will be a thriving, fully-enrolled K–8 community rooted in Montessori principles and known for academic excellence, joyful learning, and strong student outcomes. Students will demonstrate deep critical thinking, independence, and social-emotional growth, with a strong foundation for success in high school and beyond. Families will be active partners in the life of the school, and the staff will reflect the diversity of the community it serves. The school will consistently meet or exceed its academic, operational, and financial goals, have a strong reputation across the region, and serve as a model for how Montessori public education can expand access and opportunity for all children. Encompass will be firmly established as a stable, reflective, and mission-driven school, continually growing to meet the needs of its students and community. 5-Year Success Metrics Include: ● **Enrollment:** ○ School operates at or near full enrollment (e.g., 95–100% of target capacity across all grade bands K–8). ● **Academic Growth:** ○ At least **70% of students score at or above grade level or meet or exceed growth targets** on state assessments. ○ Demonstrated academic progress across Montessori assessment tools (e.g., rubrics, portfolios, formative checklists). ● **Student Outcomes:**

	○ Students demonstrate growth in independence, executive functioning, and social-emotional learning (measured via developmental rubrics and observational tools aligned to Montessori outcomes). ● **Family Engagement:** ○ **85% or more families** participate in student-led conferences, community events, or family learning opportunities annually. ○ High satisfaction on annual family surveys (e.g., 90%+ agree their child is supported and known). ● **Staff Retention and Development:** ○ Annual staff retention rate of **85% or higher**. ○ 100% of lead guides Montessori-trained (or actively enrolled in certification), with strong mentorship systems in place. ● **Equity and Access:** ○ Enrollment reflects regional demographics with equitable representation of **SWD**, **ELL**, and **EDS** populations. ○ Weighted lottery is fully implemented and effective in supporting diverse enrollment. ● **Financial Health:** ○ Clean audits annually with positive fund balance maintained. ○ Strategic, mission-aligned investment in staff, programming, and facilities. ● **Reputation and Community Presence:** ○ Encompass is recognized locally as a **model for public Montessori education**.

	○ Strong partnerships in place with local organizations, schools, and community stakeholders.
What specific steps will the charter school board need to take to ensure that the school is successful?	The charter board will take the following key steps to ensure the success of the school: ● **Hire and support strong leadership:** Select a qualified school leader and provide ongoing oversight and mentorship. **Maintain a clear, mission-driven focus:** Ensure all decisions align with the school's founding vision and core values. ● **Establish strong governance practices:** Set clear policies, hold regular meetings, and monitor academic, financial, and operational performance. ● **Oversee financial health:** Approve budgets, review financial reports, and ensure sustainable fiscal management. ● **Engage with the community:** Build relationships with families, local organizations, and community leaders to strengthen support. ● **Monitor academic outcomes:** Regularly review student achievement data and ensure the school is meeting or exceeding its goals. ● **Support strategic growth and improvement:** Help the school plan for challenges, assess risks, and adapt to changing needs while staying true to the mission.
How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interests of the school?	If I ever felt that another board member had acted unethically or in a way that wasn't in the best interest of the school, I would see it as my responsibility to act carefully and thoughtfully. I would start by grounding myself in the board's Code of Ethics and our shared commitments, making sure I understood the expectations we've all agreed to uphold. Then, I would bring the concern to the Board Chair privately, focusing on the facts and the well-being of the school, not on

	personal conflict. Depending on the situation, the Chair might help guide a conversation, or bring it to the full board or a committee if needed. Throughout, I would do my best to stay anchored in respect, confidentiality, and the understanding that our role as a board is to protect the mission, the students, and the trust our community places in us.

Certification
I, _____Sara P Suchman_____, certify to the best of my knowledge and ability that the information I am providing to the North Carolina State Board of Education as a prospective board member for **Encompass Montessori Charter School** is true and correct in every respect.

Board Member's Signature	
Signature	**Date** April 25, 2025

**If you responded within the application that disciplinary action has been taken against any past or present professional licenses, provide a detailed response below outlining the disciplinary action and the license validity.*

Office of CHARTER SCHOOLS
NC Department of Public Instruction

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School Information	
Name of charter school	**Encompass Montessori**

Board Member's Information	
Board Members	Full name: Katie Brown
	Home Address: 208 W Hill Dr, Cary NC 27519
	Business Name & Address: National Center for Montessori in the Public Sector, 125 Whiting Ln, West Hartford CT 06119
	Telephone No.: 949-400-6175

	E-mail address: katie.brown@public-montessori.org

Board Member Application	
Have you previously served on a board of a school district, another charter school, a non-public school, or any non-profit corporation?	No: ☐ Yes: X
Educational History	**Doctor of Philosophy, University of North Carolina at Charlotte** Concentration: Curriculum & Instruction, **Master of Arts in Education, University of Phoenix** Concentration: Secondary Teacher Education **Bachelor of Arts, University of California, San Diego** Concentration: English Literature
Employment History	**National Center for Montessori in the Public Sector** Director of Research and Professional Learning, 2021-present Director of Professional Learning & Research Associate, 2019-2021 DC Regional Coordinator & Research Associate, 2016-2019 Research Associate, 2015-2016 **University of North Carolina at Charlotte, Charlotte, NC** Graduate Research Assistant, 2014-2016 **South Carolina Department of Education, Columbia, SC** Education Associate, 2012-2013

	Monroe Middle School, Monroe, NC Language Arts Teacher, 2009-2012 **Audeo Charter School, San Diego, CA** Teacher—Independent Study Grades 6-12, 2008-2009
How were you recruited to join this Board of Directors?	My organization is one of the sponsors of the charter application.
Why do you wish to serve on the board of the proposed charter school?	I have dedicated the last 10 years of my career to studying and supporting the public Montessori movement, and I am eager to help increase access to public Montessori in my home state of North Carolina. I have a combined 9 years of experience serving on charter school boards and believe that with this experience, I can help Encompass Montessori succeed.
What is your understanding of the appropriate role of a public charter school board member?	The role of a charter school board member is to set long-term strategic priorities for the charter school, supervise the executive director, and safeguard the financial health of the school.
Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you can be an effective board member.	I served two terms on the board of Breakthrough Montessori Public Charter School in Washington, DC, and two terms on the board of the Laura Holland Uzzell Foundation, which serves as the governing board for Sterling Montessori Academy and Charter School in Morrisville, NC. I remain on the LHUF board an advisory (non-voting) member.
Describe the specific knowledge and experience that you would bring to the board.	As a board member, I have shepherded charter schools though periods of growth and change, including changes in leadership, expansion of facilities, strategic planning, and charter renewal. I have served in the roles of treasurer and secretary, and have served on governance, strategic planning, academic, and search committees at the board level. I have also completed Charter Board Governance Academy with

	Bellwether Education and a training on the Open Meetings Act in the District of Columbia.

School Mission and Program	
What is your understanding of the school's mission and guiding beliefs?	Encompass Montessori will be the flagship school in a network of high-quality public Montessori schools in North Carolina, dedicated to providing inclusive and exciting learning environments where all students can unlock their full potential. Students will leave Encompass with the skills they need to thrive and make positive contributions to their communities.
What is your understanding of the school's proposed educational program?	Encompass Montessori will be firmly grounded in the Montessori pedagogy and curriculum, a research-based educational approach informed by the science of learning and human development.
What do you believe to be the characteristics of a successful school?	Successful schools center children and families, set ambitious goals for learning and growth, nurture community, and are powered by adults united by a common sense of purpose.
How will you know that the school is succeeding (or not) in its mission?	Metrics that I would use to assess the success of the school include the North Carolina School Report Card; results from both academic and non-academic student assessments; family and community survey results; staff survey results; staff and student retention rates; measures of the school's financial heath, including debt service coverage ratio, a balanced budget, and days of cash on hand; and enrollment data.

Governance	
Describe the role that the board will play in the school's operation.	While the board is not involved in the day-to-day operations of a school, the board provides guidance to the school leadership team in how resources can be allocated to further the school's mission and vision.

How will you know if the school is successful at the end of the first year of operation?	Indicators that the school is successful at the end of the first year include: • the school fully implements Montessori pedagogy • the school retains founding families and staff at high levels • the school's finances are sound • the school's plan for growth and expansion is proceeding as expected • the school learns quickly from both successes and mistakes as it charts a path forward
How will you know at the end of five years of the schools is successful?	Indicators that the school is successful at the end of the first year include: • the school provides a consistent, high-quality Montessori learning experience across classrooms • the school retains families and staff at high levels • the school is financially healthy and has a plan for development • the school's academic results are in line with goals • the school is recruiting and retaining its target population of children and families • the board has transitioned from a founding board to a governing board • the school has undertaken strategic planning • the school has successfully navigated the charter renewal process
What specific steps will the charter school board need to take to ensure that the school is successful?	During the founding period, the board will set Encompass Montessori up for success by providing support and guidance to the founding leadership team, thoughtfully structuring the school's budget, and securing facilities to meet both short- and long-term needs.
How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interests of the school?	In this situation, an investigation by the Governance committee might be an appropriate first step. If unethical or illegal activity is found to be occurring, this should be reported to the Office of Charter Schools.

Certification

I, Katie Brown, certify to the best of my knowledge and ability that the information I am providing to the North Carolina State Board of Education as a prospective board member for Encompass Montessori Charter School is true and correct in every respect.

Board Member's Signature

Signature:	**Date: 4/22/25**

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NC Department of Public Instruction

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School Information	
Name of charter school	Encompass Montessori Charter School

Board Member's Information	
Board Members	Full name: Candace Fletcher
	Home Address: 150 Hendrix Drive, Oak Ridge, TN 37830
	Business Name & Address: Encompass Montessori 4030 Wake Forest Road, Suite 349 Raleigh, NC 27609
	Telephone No.: (256) 227-9253

	E-mail address: candace.fletcher@public-montessori.org

Board Member Application	
Have you previously served on a board of a school district, another charter school, a non-public school, or any non-profit corporation?	No: ☐ Yes: ✔
Educational History	**Xavier University, Cincinnati, OH** *Master of Education, Montessori Education* August 2008 **University of Tennessee, Knoxville, TN** *Bachelor of Arts, Psychology* May 2004
Employment History	**National Center for Montessori in the Public Sector, Remote** *Practicum Coordinator, Instructor & Coach* July 2021 - present **Silver Sands Montessori Charter School, Henderson, NV** *Montessori Teacher* August 2019 - April 2021 **Element Education, Inc./Community Montessori, Escondido, CA** *Montessori Regional Manager/Educational Facilitator* August 2015 - June 2019 **Keiller Leadership Academy, San Diego, CA** *Montessori Teacher* *January 2013 - June 2015*

	Boys & Girls Clubs of Oceanside, CA *Area Director* August 2012 - January 2013 *Site Director* *August 2011 - August 2012* **San Diego Jewish Academy Preschool, San Diego, CA** *Building Substitute* August 2011 - 2012 **Cincinnati Public Schools/Winton Montessori School, Cincinnati, OH** *Montessori Teacher* August 2007 - July 2010
How were you recruited to join this Board of Directors?	I was recruited to this board of directors as a direct result of my work with the National Center for Montessori in the Public Sector. My time in the field, first as a Montessori teacher and then as a school leader within a Montessori charter school network, provided me with a deep understanding of the opportunities and challenges within public Montessori. It was through the fulfillment of my responsibilities at the National Center that my contributions and insights were recognized, leading to this invitation to serve on the board.
Why do you wish to serve on the board of the proposed charter school?	It is an honor to serve on this board because it presents a powerful opportunity to champion expanded access to public Montessori programs. Having benefited from the Montessori approach since the age of two and a half, I've gained invaluable skills and tools that I am eager to leverage to give back to the Montessori community. My vision includes contributing to the founding of a new school, an endeavor deeply rooted in a desire to humanize teacher education and actively participate in building strong, supportive communities. Ultimately, my driving force is to provide children and families who are furthest from

	opportunity with a meaningful academic choice grounded in the transformative Montessori method.
What is your understanding of the appropriate role of a public charter school board member?	In my understanding, the appropriate role of a public charter school board member is to provide oversight of Encompass Montessori Charter School's charter and bylaws to ensure that the school consistently operates in line with its stated mission and educational philosophy.
Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you can be an effective board member.	My previous experience directly relevant to serving on this charter school's board includes my current membership on the board of Montessori for Social Justice. Additionally, during the 2023-2024 school year, I had the opportunity to provide consultation post-programmatic review to the Sussex Montessori Charter School (Seaford, DE) board. These experiences have provided me with valuable insights into board governance, strategic planning, and the unique needs and opportunities within the Montessori ecosystem and charter school sector.
Describe the specific knowledge and experience that you would bring to the board.	As a lifelong Montessori student, I bring a deep, personal understanding of the method's power. My experience extends to the classroom, having served as a Montessori teacher in both the Midwest and on the West Coast, providing me with diverse perspectives on implementation. Furthermore, as a Montessori trainer with national reach, I possess a comprehensive grasp of pedagogical best practices and current trends in Montessori education. My work with the National Center for Montessori in the Public Sector (NCMPS) has equipped me with invaluable expertise in nationwide technical assistance and school startup. Coupled with my previous school leadership experience and ongoing work as a professional development provider and coach for public Montessori schools and educators across the country, I offer a multifaceted

	understanding of the educational landscape and the specific needs of public Montessori environments.

School Mission and Program	
What is your understanding of the school's mission and guiding beliefs?	Encompass' mission – to provide Wake County 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 – deeply resonates with my personal and professional values. I appreciate the transparency of this mission, which clearly articulates Encompass' "why" – a commitment not only to authorization but, more importantly, to the children, families, and community it will serve. This dedication to providing access to the transformative Montessori method for a diverse range of learners is particularly compelling. The mission's emphasis on a proven method grounded in over a century of history, yet acknowledging its ongoing evolution, reflects a balanced and informed perspective. I understand Encompass' commitment to a full implementation that empowers children with critical thinking, self-directed learning, and ownership of their environment – core tenets of the Montessori approach, which centers on the child's holistic (material and spiritual) development. The carefully prepared environment, where children actively construct their understanding with adult guidance, and the invitation-based lesson approach that fosters intrinsic motivation, are key to this transformative learning. The inclusion of human flourishing in Encompass' mission is particularly significant. Having encountered this concept at the National Center for Montessori in the Public Sector, I recognize its power in

	moving beyond mere existence to genuine thriving. Encompass' commitment to fostering an environment where families witness their children's growth in skills, mindset, and community engagement is inspiring. The intention to measure this flourishing through observational data and tools like the Developmental Environment Rating Scale demonstrates a thoughtful and data-informed approach to ensuring children are truly thriving. Beyond physical safety, the mission's focus on psychological safety is crucial. Creating a space where students feel secure enough to make mistakes, resolve conflicts, and collaborate harmoniously is essential for their social-emotional development and overall well-being. Finally, the mission's aspiration to cultivate community-centered leaders is powerfully realized through the Montessori emphasis on connecting the classroom to the wider world. By incorporating elements reflective of their own communities and global connections, Encompass will encourage children to reflect on their identity, their place in the world, and their potential to contribute. The integration of global citizenship within the curriculum will empower students to become engaged and responsible members of their local and broader communities, equipped with the autonomy, skills, and relationships cultivated within the school.
What is your understanding of the school's proposed educational program?	My understanding is that Encompass' educational program is centered around a high-quality and fully implemented Montessori model. This involves a comprehensive, age-appropriate curriculum delivered through hands-on, concrete materials and guided by prepared teachers. The multi-age, looped classrooms – a hallmark of Montessori environments – will foster differentiated instruction and rich collaborative learning opportunities.

	This program will lean heavily on student agency and choice, allowing for independent activity over long work periods. Instruction will vary, incorporating individual, small, and large group lessons to meet multiple types of learning styles. Learning experiences in Montessori is inherently interdisciplinary, mirroring the interconnectedness of the real world. I understand that Encompass Montessori's instructional approach values the research highlighting the particular effectiveness of the Montessori approach for children from lower-income families and Black and Hispanic children, which will be an asset to the Wake County community where these children live and comprise the majority of families. Through the instructional program Encompass expects to deliver these outcomes: in academic achievement, executive function, and general well-being. Encompass is promising to implement the Montessori method fully. In this way, the Montessori curriculum will meet or exceed the NCSCOS and will be the MTSS Tier 1 curriculum for all students. The needs of the students at Encompass will range and vary. The curriculum – the Montessori method with all of its richness in language, and its visual and tactile nature will be beneficial for every learner on site. Multilingual children and children with special needs will recognize the benefits of this method in the same way that all other learners will. Professional learning opportunities for teachers and staff will be a priority so as to fully support the many different experiences of Encompass' student community. These learning opportunities will be continuous and ongoing so that teachers can have facility with the Montessori materials and method, as well as engage in reflective practice. They will be scientific observers in their own classrooms and contribute to a positive school culture by modeling learning and sharing their takeaways and methods with their colleagues.

	Lastly, my understanding is that the educational program prioritizes full inclusion within the classroom and in the students' least restrictive environment. Pull-out sessions and other interventions may be accessed when necessary, based on the needs each individual presents.
What do you believe to be the characteristics of a successful school?	I believe a successful school is characterized by several interconnected elements. First and foremost is the wellbeing of both students and staff. When individuals feel safe, supported, and valued, they are best positioned to thrive. This foundation enables strong academic outcomes and fosters an environment conducive to growth for everyone involved. A successful school actively works to break down barriers through wraparound services for community members that are furthest from opportunity. The size of the school, including classrooms and student population, should be thoughtfully considered to optimize the learning environment and maintain strong connections. A truly successful school also makes meaningful contributions to the community and cultivates strong relationships with local organizations, such as the fire and police departments, businesses, nursing homes, and recreational centers. Positive narratives and successes of alumni, both in high school and postsecondary pursuits, serve as powerful indicators of a school's lasting impact. Underlying all of this is a culture of mutual respect for all members of the school community and the presence of strong structures and systems that also allow for healthy discourse and critical thinking. These characteristics, working together, can create a vibrant and effective learning environment that benefits individuals and the wider community.

How will you know that the school is succeeding (or not) in its mission?	The board will know if Encompass is succeeding in its mission – "To provide Wake County 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" – by examining several key indicators. Data from the Reflective Practice Inventory Measures at the whole school, leader, and teacher levels will provide insights into our commitment to continuous improvement and alignment with our child-centered philosophy. Essential Element Review Data will demonstrate the fidelity and effectiveness of our Montessori program implementation. Developmental Environment Rating Scale (DERS) Data will offer quantitative measures of the safety and supportiveness of our learning environment. Feedback from our stakeholders will be crucial. Consistently positive feedback from families through surveys and word-of-mouth opportunities will be indicative of satisfaction with the program and environment. Similarly, feedback from students will offer valuable perspectives on their experience and if/how they are flourishing. Academic assessment data showing strong growth trends across math, literacy, and science domains will demonstrate the effectiveness of our proven Montessori approach. Meeting or exceeding enrollment projections will signal that families recognize and value the program we offer.

	The presence of sustained community partnerships will inform us as to whether or not we have been successful in fostering community-centered leadership in our students. This will also be telling of the measure of the school's integration within the wider community. By consistently monitoring these qualitative and quantitative measures, we can determine the extent to which Encompass Montessori is fulfilling its mission.

Governance	
Describe the role that the board will play in the school's operation.	Initially, the founding board will hold full governance responsibilities, transitioning to a board with specialized expertise (education, business, finance, etc.) over time. By committee, the board will address executive leadership, policy, and community standing through monthly meetings, including the Executive Director's annual review. The board's primary role will be to provide strategic guidance and ensure progress toward the school's mission by setting and evaluating the Executive Director's goals. Board committee responsibilities and expectations will be as such: ● Governance Committee: Recruit and recommend new board members committed to Montessori education and effective governance; nominate and elect board officers. ● Finance Committee: Manage Encompass Montessori's resources, including budget presentation and monitoring, policy recommendations, and support for audits. ● Fund Development Committee: Collaborate with the Leadership Team to cultivate additional resources for the school's long-term viability. ● Education/Accountability Committee: Develop and oversee an annual review of the school's educational program.

How will you know if the school is successful at the end of the first year of operation?	At the end of the first year of operation, the school's success will be evident through several key indicators. We will closely monitor student wellbeing, ensuring a safe, nurturing, and developmental environment. Academic outcomes, as measured by tools like the Minnesota Executive Function Scale (MEFS), will provide insights into student growth and achievement. Additionally, we will assess social-emotional wellbeing using a normalization checklist to understand students' holistic development. The composite Developmental Environmental Rating Scale (DERS) scores in the Child Domain will offer valuable data on the quality of the learning environment for the child. In a similar way, staff wellbeing will be a crucial metric, as a supported and thriving staff is essential for the school's success. We will utilize composite DERS scores in the Adult Domain to evaluate the adult's work in the Montessori environment. Finally, retention rates for both staff and students will serve as a strong indicator of overall satisfaction and the school's ability to create a positive and sustainable community. By analyzing these quantitative and qualitative measures, we can gain a comprehensive understanding of the school's success in its inaugural year.

How will you know at the end of five years if the school is successful?	At the end of five years, the success of Encompass Montessori will be evident through a combination of factors indicating growth, well-being, and recognition. We should see a sustained increase in student enrollment and the presence of a healthy waitlist, demonstrating the community's demand for our program. The continued wellbeing of the community, inclusive of students, staff, leadership and community members will be paramount, fostering a positive and thriving school culture. Growth in our capacity, indicated by an increase in the number of classrooms (having hit enrollment projections) will reflect our ability to meet the growing demand. We will also rely on robust observational and quantitative data gathered through tools like skills inventories, classroom observations, and normalization and adaptation checklists to track student progress and the effectiveness of our Montessori implementation. Quantitative data from i-Ready quantitative data will trend positively – showing growth for children at all skill and ability levels within each of the learning environments. Regular Essential Element Reviews will have ensured fidelity to the core principles of the Montessori method and will reflect strong implementation for the majority of its domains. External school recognition at local, regional, or even national levels will serve as a testament to our overall success and impact.

What specific steps will the charter school board need to take to ensure that the school is successful?	To ensure Encompass' success, the board should co-create agreed-upon norms and collaborate respectfully with regard to each member's individual specialties. The board must establish a clear mission and vision. Hiring and providing support for an effective leader – based on what the leader needs – will be paramount. The board will need to make every attempt possible to achieve excellent financial oversight and fundraising. The board will need to develop and oversee clear policies that are equitable as well. Relative to student academic outcomes/performance, the board should establish a system and structure by which they monitor this data. Active engagement with the community will be key. Compliance will be a major undertaking and the board should ensure compliance at a legal and charter level. The board should self-assess frequently in an honest, reflective and consistent way.
How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interests of the school?	If I believed a board member was acting unethically, my first step would be to gather specific facts and documentation. I would then review Encompass Montessori's bylaws and any relevant ethics policies to understand what the proper and agreed-upon procedures for an incident like this were. Depending on the situation and levels of trust, I might seek confidential counsel and support for my own self-reflection in this situation. I would report my concerns through the appropriate channels outlined in the governing documents clearly and respectfully – presenting the information and its potential impact on the school. I would cooperate fully with any subsequent investigation while maintaining confidentiality to protect the process and integrity of the school. I imagine that, potentially, there could be a finding of nothing being done wrong or inappropriately. I would also acknowledge that we might have to take action and remove the member from the board. Throughout this process, I would keep top of mind that the ethical standards and best interests of the school would be what the board and I would be trying to uphold.

Certification

I, Candace Fletcher, certify to the best of my knowledge and ability that the information I am providing to the North Carolina State Board of Education as a prospective board member for **Encompass Montessori Charter School** is true and correct in every respect.

Board Member's Signature

Signature	**Date** April 25, 2025

**If you responded within the application that disciplinary action has been taken against any past or present professional licenses, provide a detailed response below outlining the disciplinary action and the license validity.*

Docusign Envelope ID: CC9EDE33-DFBE-46C9-A358-6737CEEDD938

Office of CHARTER SCHOOLS
NC Department of Public Instruction

Charter School Board Member Information Form

Note: *To be completed individually by each proposed founding charter school board member. Please include a* ***one-page*** *resume with this form and sign by hand.*

Serving on a public charter school board is a position of public trust and as a board member 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, and the school's fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, the State Board of Education requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the applicant team behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

School Information	
Name of charter school	Encompass Montessori Charter School

Board Member's Information	
Board Members	Full name: Carol Pirrello
	Home Address: 555 Husketh Road, Youngsville NC 27596
	Business Name & Address: Encompass Montessori 4030 Wake Forest Road, Suite 349 Raleigh, NC 27609
	Telephone No.: 814-823-2680

Docusign Envelope ID: CC9EDE33-DFBE-46C9-A358-6737CEEDD938

	E-mail address: cpirrello@live.com

Board Member Application	
Have you previously served on a board of a school district, another charter school, a non-public school, or any non-profit corporation?	No: X Yes:
Educational History	Edinboro University of PA. BA Social Work
Employment History	Liberty Healthcare, Supervisor for Adult Protection
How were you recruited to join this Board of Directors?	Was recruited by members of the Montessori community. My son was a Montessori student at a public Montessori school and I am married to the former administrator of my son's Montessori school.
Why do you wish to serve on the board of the proposed charter school?	To serve the community. As a social worker our schools are one of the best places to reach families in need. Having worked in schools for 11 years, I saw our positive impact first hand.
What is your understanding of the appropriate role of a public charter school board member?	To govern. To ensure the laws and regulations of the State are being followed. To ensure the school reaches its intended goals.
Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you can be an effective board member.	I served on our local parish council for 5 years. We had to reach a consensus in order to be effective.

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Describe the specific knowledge and experience that you would bring to the board.	As a social worker, I have practical knowledge on how to bring community resources into the school setting. These resources can help solve problems and improve learning for all the students.

School Mission and Program	
What is your understanding of the school's mission and guiding beliefs?	As a Montessori school, it is to provide an education that positively impacts all students academically, emotionally and socially.
What is your understanding of the school's proposed educational program?	To create a public Montessori school so students can learn to think critically and solve problems.
What do you believe to be the characteristics of a successful school?	Adequate test scores, low incidents of violence, a proactive behavior plan and teachers who understand human development.
How will you know that the school is succeeding (or not) in its mission?	As a public Montessori school it will be successful if all the key metrics are met. Is the school academically in compliance with DPI regulations? Is it in compliance financially? Is it in compliance with Montessori assessment tools?

Governance	
Describe the role that the board will play in the school's operation.	Initially, the founding board will hold full governance responsibilities, transitioning to a board with specialized expertise (education, business, finance, etc.) over time. By committee, the board will address executive leadership, policy, and community standing through monthly meetings, including the Executive Director's annual review. The board's primary role will be to provide strategic guidance and ensure progress toward the

Docusign Envelope ID: CC9EDE33-DFBE-46C9-A358-6737CEEDD938

	school's mission by setting and evaluating the Executive Director's goals. Board committee responsibilities and expectations will be as such: ● Governance Committee: Recruit and recommend new board members committed to Montessori education and effective governance; nominate and elect board officers. ● Finance Committee: Manage Encompass Montessori's resources, including budget presentation and monitoring, policy recommendations, and support for audits. ● Fund Development Committee: Collaborate with the Leadership Team to cultivate additional resources for the school's long-term viability. ● Education/Accountability Committee: Develop and oversee an annual review of the school's educational program.
How will you know if the school is successful at the end of the first year of operation?	We will know the school is successful if it meets its stated goals and is on track with their strategic plan.
How will you know at the end of five years if the school is successful?	We will know the school is successful if it meets its stated goals and the state renews its charter.
What specific steps will the charter school board need to take to ensure that the school is successful?	Clear metrics to define success in academics and finance.
How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interests of the school?	If I believed this was true, I would consult with our lawyer first. Upon their advice I would take their recommended actions. I would also check with the state to make sure the legal advice I was receiving was following DPI regulations.

Docusign Envelope ID: CC9EDE33-DFBE-46C9-A358-6737CEEDD938

Certification

I,Carol Pirrello, certify to the best of my knowledge and ability that the information I am providing to the North Carolina State Board of Education as a prospective board member for **Encompass Montessori Charter School** is true and correct in every respect.

Board Member's Signature

Signature DocuSigned by: Carol Pirrello 5483D41AE78D4DE...	**Date 4/25/25** 4/25/2025

**If you responded within the application that disciplinary action has been taken against any past or present professional licenses, provide a detailed response below outlining the disciplinary action and the license validity.*

Office of CHARTER SCHOOLS
NC Department of Public Instruction

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: X** **Yes:** ☐ **Not yet identified:** ☐	Name of Selected Board Attorney: Click or tap here to enter text.
	Business/Law Firm Name: 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.
	E-mail address: Click or tap here to enter text.

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:** **X**	Name of Selected Board Auditor: Click or tap here to enter text.
	Business/Firm Name: 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.

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:** **X** **Not yet identified:** ☐	Name of Selected Management Organization: Epic Change Education Inc
	Business Address: 9907 8th St Unit 873, Gotha, FL 34634
	Telephone No.: 310-704-5295
	Email address: epicchangeeducation@gmail.com

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.	Name of Selected Financial Management Service Provider: Click or tap here to enter text.

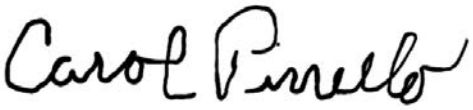
No: X **Yes:** ☐ **Not yet identified: X**	Business Address: Click or tap here to enter text.
	Telephone No.: Click or tap here to enter text.
	Email address: Click or tap here to enter text.

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:** ☐ **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. Stephen E Griffin
5. 	6.
7.	8.
9.	10.
11.	12.
13.	14.
15.	16.

VIII. Certification of Board Chair

I, Candace Fletcher, 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 Encompass Montessori Charter School is true and correct in every respect.

Signature:	**Date: 4/25/25**

Carol Pirrello

cpirrello@live.com • (814) 823-2680

Summary

Dedicated human service professional with extensive experience serving clients in diverse capacities throughout the state. Proven ability to provide compassionate and professional support while effectively managing cases, supervising staff, and ensuring program compliance.

Education

BS in Social Work • Edinboro University of Pennsylvania - Edinboro, PA (1990-1995)

Work Experience

Senior Case Manager September 2019 to Present
Veterans Multi-Service Center - Downingtown, PA

Provided social work services, including assessments, treatment planning, and counseling, ensuring policy compliance and collaborating on patient care.

Social Worker February 2017 to September 2019
Millcreek Community Hospital - Erie, PA

Delivered social work services—assessments, treatment, counseling—ensuring compliance and collaborating on patient care.

School Guidance Counselor August 2014 to February 2017
St. George School - Erie, PA

Led intervention teams, coordinated special education and grief support, managed student issues, and provided social/academic instruction.

School Guidance Counselor January 2007 to August 2014
Our Lady's Christian School - Erie, PA

I led teams, coordinated special education and grief support ("Rainbows"), managed student issues, facilitated activities, and provided social/academic instruction.

Rehabilitation Coordinator November 2005 to October 2007
Stairways Behavioral Health - Erie, PA

Provided client services including community connections, assessments, treatment planning, medication monitoring, crisis intervention, placement management, and therapeutic groups.

Skills

Case Management, Documentation, Mental Health, Microsoft Office, Problem Solving, Management, Motivational Interviewing, Addiction Counseling, Crisis Intervention, Social Work, Time Management, Microsoft Excel, Driving, Intake, Microsoft Word, Leadership, Experience with Children, HIPAA, Data Collection, Supervising Experience

SARA P. SUCHMAN

51A Thayer Ridge Road • Brattleboro, VT 05301
203-241-1432 • sara.suchman@public-montessori.org

EDUCATION

Ed.D., Education Policy, Leadership and Instructional Practice, *Presidential Scholar*
HARVARD UNIVERSITY GRADUATE SCHOOL OF EDUCATION · Cambridge, MA· 2012

M.B.A.
STANFORD UNIVERSITY GRADUATE SCHOOL OF BUSINESS · Stanford, CA · 1996

M.A.T., English as a Second Language
SCHOOL FOR INTERNATIONAL TRAINING · Brattleboro, VT · 1990

B.A. in Psychology, *Magna Cum Laude, Phi Beta Kappa*
WILLIAMS COLLEGE · Williamstown, MA · 1986

NON-PROFIT EDUCATION MANAGEMENT

NATIONAL CENTER FOR MONTESSORI IN THE PUBLIC SECTOR · Hartford, CT · 2012-present
Executive Director (2020 – present); Founding Team Member and Director of School Partnerships (2012 – 2020)
- First and largest national non-profit committed to expanding and improving publicly-funded Montessori schools.

INSTRUCTOR OF SCHOOL LEADERSHIP AND TEACHING

HARVARD GRADUATE SCHOOL OF EDUCATION · Cambridge, MA · 2003-2012
Facilitator and Online Instructional Designer, Programs in Professional Education
- *Enhancing Teacher Effectiveness in High Schools*

Teaching Fellow
- *School Reform; Charter Schools; Leadership & Learning; Organizational Change in Schools*

Supervisor, Teacher Education Program
Instructor in Education, Teacher Education Program
- *Foundations of Schooling and Teaching*; *Introduction to Teaching*

EXPERIENCE IN SCHOOL LEADERSHIP AND TEACHING

CAMBRIDGE-HARVARD SUMMER ACADEMY · Cambridge, MA · 2005, 06, 09
Director
- Directed all aspects of this joint effort between Harvard's Teacher Education Program and Cambridge Public Schools.

EXPLORATION SENIOR PROGRAM AT YALE · New Haven, CT · 2002, 04
Director of Curriculum
- Led 7-person curriculum office for 60 teachers and 1300 residential students during a period of culture change.

ST. MATTHEW'S EPISCOPAL DAY SCHOOL · San Mateo, CA · 1996-2001
Assistant Head of School and Middle School Director
- Directed operations and shared in oversight, programming, and evaluation/assessment of PreK–8 independent school.

Teacher, Grade 8 Algebra

FAIRFAX COUNTY PUBLIC SCHOOLS · Fairfax, VA ·1990-1993
Teacher Leader, Glasgow Middle School
- Led 7-teacher ESL Instructional Team serving 70 students in grades 7 and 8.

Teacher, Grades 7 & 8 ESL

VOLUNTEER ACTIVITIES

BREAKTHROUGH MONTESSORI PUBLIC CHARTER SCHOOL · Washington, D.C. · 2015-2023
Founding and Governing Board Member; Executive Committee

AMERICAN MONTESSORI SOCIETY · New York City, NY · October 2014-March 2016
Research Committee Member

Updated 3/25/25

KATIE E. BROWN

949.400.6175 | katie.e.brown@gmail.com | www.katieEbrown.com

EDUCATION

Doctor of Philosophy **2016**
University of North Carolina at Charlotte
Concentration: Curriculum & Instruction, Urban Education

Master of Arts in Education **2008**
University of Phoenix
Concentration: Secondary Teacher Education

Bachelor of Arts (*Magna Cum Laude)* **2006**
University of California, San Diego
Concentration: English Literature

SELECT PROFESSIONAL EXPERIENCE

National Center for Montessori in the Public Sector **2015-present**
Director of Research and Professional Learning

Responsibilities: Research design, grant writing, grant writing, data collection and analysis, instrument development, dissemination, curation and development of face-to-face and online learning opportunities for adult learners

Teacher—Language Arts **2009-2012**
Monroe Middle School, Monroe, NC

SELECT PUBLICATIONS & PRESENTATIONS

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.

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.

BOARD SERVICE

Sterling Montessori Academy and Charter School Board of Directors **2021-2024**
Breakthrough Montessori Public Charter School Board of Trustees **2018-2024**

Stephen E. Griffin

4018 Bristol Rd.
Durham, NC 27707

SUMMARY

In excess of 36 years of property, casualty, life, accident and health insurance experience with responsibilities including marketing, procurement and placement of all types of insurance. Evaluate risks and exposures and recommend appropriate coverages.

EXPERIENCE

1989- Present **Insurance People of North Carolina, Inc., Durham, NC**
President

- Oversee all aspects of commercial lines, personal lines, and benefits departments as well as oversee all duties of the administrative staff.

1985-1989 **Home Insurance Agency, Inc.**

EDUCATION

University of North Carolina at Wilmington, B. A. degree in Speech Communications, 1982
Graduate of Durham Jordan High School, 1978

INSURANCE DESIGNATIONS

`

Licensed in property, casualty, life, accident, and health.
AAI (Accredited Advisor in Insurance) Designation, 1988
Graduate of the Institute of Insurance
Graduate of Travelers Commercial Lines School
Certified Work Comp Specialist, Certified Risk Architect

COMMUNITY INVOLVEMENT

- Active member of the Independent Insurance Agents of North Carolina and currently serving on the IIANC Governmental Affairs Committee.
- Serving on the HBA - DOC Board of Directors and Executive Board of Directors.
- Member of State of North Carolina Insurance Committee
- Founding board member for the Lincoln Community Health Center Foundation
    - Chairman of the Governmental Affairs Committee for the NC Public Charter School Association.
    - Former member Board of Trustees to the North Carolina School of Math and Science 2014 - 2021.
    - Chairman of the North Carolina Educational Workforce Innovation Commission
    - Past Vice-President of Durham Interfaith Hospitality Network
    - Current Member Board of Trustees at The University of North Carolina at Wilmington
    - Current Founding Board Member of Granite Charter Academy
    - Current Member of North Carolina Restaurant & Lodging Association Governmental Affairs Committee.

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

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

Candace Fletcher

(256) 227-9253 · candace.fletcher@public-montessori.org
150 Hendrix Drive, Oak Ridge, TN 37830

PROFESSIONAL EXPERIENCE

National Center for Montessori in the Public Sector (Remote) **July 2021 - Present**
Practicum Coordinator, Instructor & Coach

- Train, coach and mentor adult learners in a nationwide, on-site Montessori Teacher Residency
- Provide technical assistance to public Montessori schools in their startup and implementation phases

Silver Sands Montessori Charter School (Henderson, NV) **August 2019 - April 2021**
Montessori Teacher

- Led classroom of 31 multi-age youth in public Montessori charter school and coached staff in Positive Discipline methods, Montessori pedagogy and Restorative Justice Model
- Developed curricula in response to needs of children and families during Covid-19 Pandemic
- Worked cross-functionally with staff, leadership and board to create return-to-in-person learning policies

Element Education, Incorporated/Community Montessori (Escondido, CA) **August 2015 - June 2019**
Montessori Regional Manager & Educational Facilitator

- Established Independent Study learning center in small network of charter schools by hiring, coaching and leading teams of novice and veteran educators and growing center 30% in three years
- Worked with leadership team to earn school first-of-its-kind charter from County Office of Education

Keiller Leadership Academy (San Diego, CA) **January 2013 - June 2015**
Montessori Teacher

- As a founding staff member, successfully led classroom of 28 mutli-age youth to academic and social-emotional success during school's first three years
- Collaborated with school leadership and board to secure accreditation from Western Association of Schools and Colleges

Boys & Girls Clubs of America (Oceanside, CA) **August 2011 - January 2013**
Area Director

- Ensured adherence to After School Education Safety (ASES) grant monies while guiding staff in providing programming for 100 adolescent youth as an enhancement to their home and school environments

San Diego Jewish Academy (San Diego, CA) **August 2011 - June 2012**
Academic Year Substitute

- Led classes of children aged 2-5 in the school's first year of operations using the Reggio-Emilia method

Cincinnati Public Schools/Winton Montessori School (Cincinnati, OH) **August 2007 - July 2010**
Montessori Teacher

- Ensured adherence to After School Education Safety (ASES) grant monies while guiding staff in providing programming for 100 adolescent youth as an enhancement to their home and school environments

EDUCATION & CERTIFICATIONS

Master of Education
Montessori Education
Xavier University, Cincinnati, Ohio

American Montessori Society
Elementary I Credential (Lifetime)

Bachelor of Arts
Psychology
University of Tennessee, Knoxville

CONFERENCES

South by Southwest EDU (SXSW EDU)
Mentor, Inaugural Mentor Program, 2025

Black Wildflowers Fund
LitExchange Presenter, 2025, Fireside Chat, 2024

Montessori for Social Justice
Presenter, 2023

The Montessori Event
Presenter, 2022, 2024

National Center for Montessori in the Public Sector
Presenter, 2022, 2024

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Presenter, 2023

The Montessori Event
Presenter, 2022, 2024

National Center for Montessori in the Public Sector
Presenter, 2022, 2024

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 expe
please indicate any plans to increase the grade levels offered by the school over time and be sure these figures match th

If applying as 'Statewide Virtual', select 1000-Statewide Avg as LEA 1 only. If applying as 'Regional Virtual', select a maxi
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 #1 920	LEA #2	LEA #3	LEA #1 920	LEA #2	LEA #3	LEA #1 920
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 se
subsequent years, the school may increase its enrollment only as permitted by NCGS 115C-218.7(b).

ɛcts to enroll. In addition,
ose on the initial cover page.

mum of three LEAs.
icular level.

the LEA selected above will qualify for EC funding?	13%
the LEA selected above will qualify for EC funding?	
the LEA selected above will qualify for EC funding?	

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

ɛt 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	#NAME?	96	#NAME?
Local Funds	#NAME?	96	#NAME?
State EC Funds	#NAME?	18	#NAME?
Federal EC Funds	$1,514.35	18	$27,803.47
		Total:	#NAME?

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

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 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
State ADM Funds	#NAME?	#NAME?	#NAME?	#NAME?
Local Per Pupil Funds	#NAME?	#NAME?	#NAME?	#NAME?
State EC Funds	#NAME?	#NAME?	#NAME?	#NAME?
Federal EC Funds	-	$ 27,803	$ 64,875	$ 83,410
Other Funds*	$ 250,000			
Working Capital*				
TOTAL REVENUE:	#NAME?	#NAME?	#NAME?	#NAME?

**All budgets should balance indicating strong budgetary skills. Any negative fund balances will, more than likely, generate a those evaluating the application. If the applicant is depending on other funding sources or working capital to balance the op provide documentation such as signed statements from donors, foundations, bank documents, etc., on the commitment of t 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 Append

on federal funding in

Year 5
#NAME?
#NAME?
#NAME?
$ 101,946
#NAME?

ıdditional questions by
erating budget, please
'hese funds. If these

dix 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
Office			
Office Supplies	$ 8,000.00	$ 10,000.00	$ 12,000.00
Paper	$ 4,000.00	$ 8,000.00	$ 12,000.00
Computers & Software	$ 10,000.00	$ 12,000.00	$ 10,000.00
Communications & Telephone	$ 6,000.00	$ 6,000.00	$ 6,500.00
Copier leases	$ 20,000.00	$ 20,000.00	$ 20,000.00
Other	$ 3,000.00	$ 3,000.00	$ 5,500.00
*** Insert rows and edit text as needed. ***			
Management Company			
Contract Fees	$ 161,500.00	$ 322,479.00	$ 454,585.00
Other	$ -		
*** Insert rows and edit text as needed. ***			
Professional Contract			
Legal Counsel	$ 1,000.00	$ 1,000.00	$ 1,000.00
Student Accounting	$ -	$ -	$ -
Financial	$ -	$ -	$ -
Other			
*** Insert rows and edit text as needed. ***			
Facilities			
Facility Lease/Mortgage	$ 150,000.00	$ 350,000.00	$ 450,000.00
Maintenance	$ -	$ -	$ -
Custodial Supplies	$ 1,000.00	$ 2,000.00	$ 2,000.00
Custodial Contract	-	$ -	$ -
Insurance (pg19)	$ 13,000.00	$ 13,000.00	$ 14,000.00
Playspace		$ 7,000.00	$ 20,000.00
*** Insert rows and edit text as needed. ***			
Utilities			
Electric	$ 7,000.00	$ 10,000.00	$ 12,000.00
Gas	$ 7,000.00	$ 10,000.00	$ 12,000.00
Water/Sewer	$ 7,000.00	$ 10,000.00	$ 12,000.00
Trash	$ 4,000.00	$ 4,000.00	$ 5,000.00
Other	$ 7,000.00	$ 10,000.00	$ 12,000.00
*** Insert rows and edit text as needed. ***			
Transportation			
Buses	$ -	$ -	$ -
Gas	$ -	$ -	$ -
Oil/Tires & Maintenance	$ -	$ -	$ -
Other	$ -	$ -	$ -
*** Insert rows and edit text as needed. ***	$ -	$ -	$ -
	$ -	$ -	$ -

Other			
Marketing	$ -	$ -	$ -
Child nutrition	$ -	$ -	$ -
Travel	$ -	$ 2,000.00	$ 3,000.00
Association & Professional Dues	$ 500.00	$ 1,000.00	$ 1,500.00
BOD Expenses		$ 2,000.00	$ 2,000.00
Total Administrative & Support Operations:	$ 410,000.00	$ 803,479.00	$ 1,067,085.00

OPERATIONS BUDGET: Instructional	Year 1	Year 2	Year 3
Classroom Technology			
Classrooom/Student Devices	$ 5,000.00	$ 10,000.00	$ 12,000.00
Software (LMS, SIS, etc.)	$ 3,000.00	$ 4,000.00	$ 5,000.00
Wifi Access (Remote Applicants ONLY)			
Other	$ -	$ -	$ -
Instructional Contract			
Staff Development	$ -	$ 46,000.00	$ 62,000.00
*** Insert rows and edit text as needed. ***			
Books and Supplies			
Instructional Materials	$ 30,000.00	$ 90,000.00	$ 90,000.00
Curriculum/Texts	$ 2,000.00	$ 2,000.00	$ 2,500.00
Testing Supplies	$ 5,000.00	$ 5,000.00	$ 6,000.00
*** Insert rows and edit text as needed. ***			
Total Instructional Operations:	$ 45,000.00	$ 157,000.00	$ 177,500.00

TOTAL OPERATIONS:	$ 455,000.00	$ 960,479.00	$ 1,244,585.00

**Applicants may amend this table and the position titles to fit their Education and Operations Plans.*

Year 4	Year 5
$ 12,000.00	$ 14,000.00
$ 14,000.00	$ 15,000.00
$ 12,000.00	$ 12,000.00
$ 6,500.00	$ 7,000.00
$ 20,000.00	$ 20,000.00
$ 6,000.00	$ 6,500.00
$ 584,467.00	$ 714,348.00
$ 1,000.00	$ 1,000.00
$ -	$ -
$ -	$ -
$ 550,000.00	$ 650,000.00
$ -	$ -
$ 2,000.00	$ 2,000.00
$ -	$ -
$ 14,000.00	$ 15,000.00
$ 3,000.00	$ 3,000.00
$ 14,000.00	$ 15,000.00
$ 14,000.00	$ 15,000.00
$ 14,000.00	$ 15,000.00
$ 5,500.00	$ 6,000.00
$ 12,000.00	$ 12,000.00
$ -	$ -
$ -	$ -
$ -	$ -
$ -	$ -
$ -	$ -
$ -	$ -

$ -	$ -
$ -	$ -
$ 4,000.00	$ 5,000.00
$ 2,000.00	$ 2,500.00
$ 2,000.00	$ 2,000.00
$ 1,292,467.00	$ 1,532,348.00

Year 4	Year 5
$ 12,000.00	$ 14,000.00
$ 6,000.00	$ 7,000.00
$ -	$ -
$ 74,000.00	$ 90,000.00
$ 90,000.00	$ 90,000.00
$ 3,000.00	$ 3,500.00
$ 7,000.00	$ 8,000.00
$ 192,000.00	$ 212,500.00

$ 1,484,467.00	$ 1,744,848.00

Personnel Budget: Expenditure Projections

Budget Expenditure Projections	Year 1			Year 2			Year 3			Year 4			Year 5		
	Number of	Average Salary	Total Salary	Number of	Average Salary	Total Salary	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	$ 115,000	$ 115,000	1	$ 125,000	$ 125,000	1	$ 126,000	$ 126,000	1	$ 126,500	$ 126,500
Principal	0			1	$ 95,000	$ 95,000	1	$ 100,000	$ 100,000	1	$ 101,000	$ 101,000	1	$ 101,500	$ 101,500
Assistant Administrator/AP	1	$ 65,000	$ 65,000	0			0			0			0		
Finance Officer	0		$ -	0		$ -	0		$ -	0		$ -	0		$ -
Clerical/Front Office	1	$ 25,000	$ 35,000	1	$ 35,000	$ 35,000	1	$ 35,000	$ 36,000	1	$ 37,000	$ 37,000	1	$ 37,500	$ 37,500
Food Service Staff	0			1	$ 25,000	$ 25,000	1	$ 27,000	$ 27,000	1	$ 28,000	$ 28,000	1	$ 28,500	$ 28,500
Custodians	0		$ -	1	$ 35,000	$ 35,000	2	$ 37,000	$ 74,000	2	$ 39,000	$ 82,000	2	$ 41,500	$ 83,000
88	0		$ -	1	$ 45,000	$ 45,000	1	$ 46,000	$ 46,000	1	$ 47,000	$ 47,000	1	$ 47,500	$ 47,500
Registrar	0		$ -			$ -			$ -			$ -			$ -
IT	0		$ -			$ -			$ -			$ -	1	$ 50,000	$ 50,000
Health Aide	0		$ -				1	$ 45,000	$ 45,000			$ -	1	$ 50,000	$ 50,000
			$ -			$ -			$ -			$ -			$ -
			$ -			$ -			$ -			$ -			$ -
Total Admin and Support:	3		$ 195,000	6		$ 350,000	8		$ 453,000	7		$ 421,000	9		$ 524,500
Instructional Personnel															
Core Content Teacher(s)	6	$ 45,000	$ 270,000	10	$ 53,000	$ 530,000	14	$ 55,000	$ 770,000	18	$ 56,000	$ 1,008,000	22	$ 56,500	$ 1,243,000
Electives/Specialty Teacher(s)			$ -	1	$ 50,000	$ 50,000	3	$ 52,000	$ 156,000	4	$ 53,000	$ 212,000	5	$ 53,500	$ 267,500
Exceptional Children Teacher(s)	1	$ 50,000	$ 50,000	2	$ 53,000	$ 106,000	2	$ 55,000	$ 110,000	2	$ 56,000	$ 112,000	3	$ 56,500	$ 169,500
Montessori Instructional Support Coaches	0		$ 45,000	1	$ 48,000	$ 100,000	2	$ 50,000	$ 153,000	3	$ 51,000	$ 154,500	3	$ 51,500	$ 154,500
Teacher Assistants	6	$ 25,000	$ 150,000	10	$ 28,000	$ 280,000	14	$ 30,000	$ 420,000	18	$ 31,000	$ 558,000	22	$ 31,500	$ 693,000
Grade Level Lead Stipends			$ -	3	$ 3,000	$ 9,000	4	$ 3,100	$ 12,400	5	$ 3,200	$ 16,000	6	$ 3,300	$ 19,800
*** Edit text as needed. ***			$ -			$ -			$ -			$ -			$ -
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*** Edit text as needed. ***			$ -			$ -			$ -			$ -			$ -
Total Instructional Personnel:	13		$ 515,000	27		$ 1,075,000	39		$ 1,621,400	50		$ 2,060,500	61		$ 2,547,300
Total Admin, Support and Instructional Personnel:	16		$ 710,000	33		$ 1,425,000	47		$ 2,074,400	57		$ 2,481,500.00	70		$ 3,071,800

Benefits	Year 1			Year 2			Year 3			Year 4			Year 5		
	Number of	Cost Per	Total	Number of	Cost Per	Total	Number of	Cost Per	Total	Number of	Cost Per	Total	Number of	Cost Per	Total
Administrative & Support Benefits															
Health Insurance	3	$ 1,495	$ 4,485	6	$ 1,495	$ 8,970	8	$ 1,495	$ 11,960	8	$ 1,495	$ 11,960	10	$ 1,495	$ 14,950
Retirement Plan--NC State	3	$ 1,495	$ 4,485	6	$ 1,495	$ 8,970	8	$ 1,495	$ 11,960	8	$ 1,495	$ 11,960	10	$ 1,495	$ 14,950
Retirement Plan--Other	0		$ -	0		$ -	0		$ -	0		$ -	0		$ -
Life Insurance	0		$ -	0		$ -	0		$ -	0		$ -	0		$ -
Disability	3	$ 1,495	$ 4,485	6	$ 1,495	$ 8,970	8	$ 1,495	$ 11,960	8	$ 1,495	$ 11,960	10	$ 1,495	$ 14,950
Medicare	3	$ 1,495	$ 4,485	6	$ 1,495	$ 8,970	8	$ 1,495	$ 11,960	8	$ 1,495	$ 11,960	10	$ 1,495	$ 14,950
Social Security	3	$ 1,495	$ 4,485	6	$ 1,495	$ 8,970	8	$ 1,495	$ 11,960	8	$ 1,495	$ 11,960	10	$ 1,495	$ 14,950
*** Edit text as needed. ***			$ -			$ -			$ -			$ -			$ -
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*** Edit text as needed. ***			$ -			$ -			$ -			$ -			$ -
Total Admin and Support Benefits:			$ 22,425			$ 44,850			$ 59,800			$ 59,800			$ 74,750
Instructional Personnel Benefits															
Health Insurance	13	$ 1,495	$ 19,435	18	$ 1,495	$ 26,910	25	$ 1,495	$ 37,375	30	$ 1,495	$ 44,850	36	$ 1,495	$ 53,820
Retirement Plan--NC State	13	$ 1,495	$ 19,435	18	$ 1,495	$ 26,910	25	$ 1,495	$ 37,375	30	$ 1,495	$ 44,850	36	$ 1,495	$ 53,820
Retirement Plan--Other	0		$ -	0		$ -	0		$ -	0		$ -			$ -
Social Security	13	$ 1,495	$ 19,435	19	$ 1,495	$ 28,405	25	$ 1,495	$ 37,375	30	$ 1,495	$ 44,850	36	$ 1,495	$ 53,820
Disability	13	$ 1,495	$ 19,435	19	$ 1,495	$ 28,405	25	$ 1,495	$ 37,375	30	$ 1,495	$ 44,850	36	$ 1,495	$ 53,820
Medicare	13	$ 1,495	$ 19,435	19	$ 1,495	$ 28,405	25	$ 1,495	$ 37,375	30	$ 1,495	$ 44,850	36	$ 1,495	$ 53,820
Life Insurance	0		$ -	0		$ -	0		$ -	0		$ -			$ -
*** Edit text as needed. ***			$ -			$ -			$ -			$ -			$ -
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*** Edit text as needed. ***			$ -		$ 6	$ -			$ -			$ -			$ -
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*** Edit text as needed. ***			$ -			$ -			$ -			$ -			$ -
Total Instructional Personnel Benefits:			$ 97,175			$ 139,035			$ 186,875			$ 224,250			$ 269,100
Total Personnel Benefits:			$ 119,600			$ 183,885			$ 246,675			$ 284,050			$ 343,850

Total Admin & Support Personnel (Salary & Benefits):	3		$ 217,425	6		$ 394,850	8		$ 512,800	7		$ 480,800.00	9		$ 599,250
Total Instructional Personnel (Salary & Benefits):	13		$ 612,175	27		$ 1,214,035	39		$ 1,808,275	50		$ 2,284,750	61		$ 2,816,400

TOTAL PERSONNEL:	16		$ 829,600	33		$ 1,608,885	47		$ 2,321,075	57		$ 2,765,550	70		$ 3,415,650

*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.

Overall Budget

SUMMARY	Logic	Year 1	Year 2	Year 3	Year 4	Year 5
Total Personnel	J	$ 829,600.00	$ 1,608,885.00	$ 2,321,075.00	$ 2,765,550.00	$ 3,415,650.00
Total Operations	M	$ 455,000.00	$ 960,479.00	$ 1,244,585.00	$ 1,484,467.00	$ 1,744,848.00
Total Expenditures	N = J + M	$ 1,284,600.00	$ 2,569,364.00	$ 3,565,660.00	$ 4,250,017.00	$ 5,160,498.00
Total Revenue	Z	#NAME?	#NAME?	#NAME?	#NAME?	#NAME?
Surplus / (Deficit)	= Z - N	#NAME?	#NAME?	#NAME?	#NAME?	#NAME?

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 expe
please indicate any plans to increase the grade levels offered by the school over time and be sure these figures match th

If applying as 'Statewide Virtual', select 1000-Statewide Avg as LEA 1 only. If applying as 'Regional Virtual', select a maxi
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 #1 920	LEA #2	LEA #3	LEA #1 920	LEA #2	LEA #3	LEA #1 920
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 se
subsequent years, the school may increase its enrollment only as permitted by NCGS 115C-218.7(b).

ɛcts to enroll. In addition,
ose on the initial cover page.

mum of three LEAs.
ɨicular level.

the LEA selected above will qualify for EC funding?	12.75%
the LEA selected above will qualify for EC funding?	
the LEA selected above will qualify for EC funding?	

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

ɛt 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	#NAME?	144	#NAME?
Local Funds	#NAME?	144	#NAME?
State EC Funds	#NAME?	18	#NAME?
Federal EC Funds	$1,514.35	18	$27,803.47
		Total:	#NAME?

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

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 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
State ADM Funds	#NAME?	#NAME?	#NAME?	#NAME?
Local Per Pupil Funds	#NAME?	#NAME?	#NAME?	#NAME?
State EC Funds	#NAME?	#NAME?	#NAME?	#NAME?
Federal EC Funds	-	$ 27,803	$ 64,875	$ 83,410
Other Funds*				
Working Capital*				
TOTAL REVENUE:	#NAME?	#NAME?	#NAME?	#NAME?

**All budgets should balance indicating strong budgetary skills. Any negative fund balances will, more than likely, generate a those evaluating the application. If the applicant is depending on other funding sources or working capital to balance the op provide documentation such as signed statements from donors, foundations, bank documents, etc., on the commitment of t 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 Append

on federal funding in

Year 5
#NAME?
#NAME?
#NAME?
$ 101,946
#NAME?

#NAME?

ıdditional questions by
erating budget, please
'hese funds. If these

dix M.

Personnel Budget: Expenditure Projections

Budget Expenditure Projections	Year 1			Year 2			Year 3			Year 4			Year 5		
	Number of	Average Salary	Total Salary	Number of	Average Salary	Total Salary	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	$ 115,000	$ 115,000	1	$ 125,000	$ 125,000	1	$ 126,000	$ 126,000	1	$ 126,500	$ 126,500
Principal	0			1	$ 95,000	$ 95,000	1	$ 100,000	$ 100,000	1	$ 101,000	$ 101,000	1	$ 101,500	$ 101,500
Assistant Administrator/AP	1	$ 65,000	$ 65,000	1	$ 75,000	$ 75,000		$ 80,000	$ 80,000	1	$ 81,000	$ 81,000	1	$ 81,500	$ 81,500
Finance Officer	0		$ -	0		$ -			$ -			$ -			$ -
Clerical/Front Office	1	$ 25,000	$ 35,000	1	$ 35,000	$ 35,000	1	$ 35,000	$ 36,000	1	$ 37,000	$ 37,000	1	$ 37,500	$ 37,500
Food Service Staff	0			1	$ 25,000	$ 25,000	1	$ 27,000	$ 27,000	1	$ 28,000	$ 28,000	1	$ 28,500	$ 28,500
Custodians	0		$ -	1	$ 40,000	$ 40,000	2	$ 40,000	$ 80,000	2	$ 41,000	$ 82,000	2	$ 41,500	$ 83,000
Guidance /Social Worker	0		$ -	1	$ 45,000	$ 45,000	1	$ 46,000	$ 46,000	1	$ 47,000	$ 47,000	1	$ 47,500	$ 47,500
Registrar	0		$ -			$ -			$ -			$ -			$ -
IT	0		$ -			$ -			$ -			$ -	1	$ 50,000	$ 50,000
Health Aide	0		$ -				1	$ 46,000	$ 46,000	1	$ 47,000	$ 47,000	1	$ 50,000	$ 50,000
			$ -			$ -			$ -			$ -			$ -
			$ -			$ -			$ -			$ -			$ -
Total Admin and Support:	3		$ 195,000	7		$ 430,000	8		$ 540,000	9		$ 549,000	10		$ 606,000
Instructional Personnel															
Core Content Teacher(s)	6	$ 50,000	$ 300,000	10	$ 53,000	$ 530,000	14	$ 55,000	$ 770,000	18	$ 56,000	$ 1,008,000	22	$ 56,500	$ 1,243,000
Electives/Specialty Teacher(s)	1	$ 25,000	$ 25,000	2	$ 50,000	$ 100,000	3	$ 52,000	$ 156,000	4	$ 53,000	$ 212,000	5	$ 53,500	$ 267,500
Exceptional Children Teacher(s)	1	$ 50,000	$ 50,000	2	$ 53,000	$ 106,000	2	$ 55,000	$ 110,000	2	$ 56,000	$ 112,000	3	$ 56,500	$ 169,500
Montessori Instructional Support Coaches	0		$ 45,000	1	$ 48,000	$ 100,000	2	$ 50,000	$ 153,000	3	$ 51,000	$ 154,500	3	$ 51,500	$ 154,500
Teacher Assistants	6	$ 25,000	$ 150,000	10	$ 28,000	$ 280,000	14	$ 30,000	$ 420,000	18	$ 31,000	$ 558,000	22	$ 31,500	$ 693,000
Grade Level Lead Stipends			$ -	3	$ 3,000	$ 9,000	4	$ 3,100	$ 12,400	5	$ 3,200	$ 16,000	6	$ 3,300	$ 19,800
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*** Edit text as needed. ***			$ -			$ -			$ -			$ -			$ -
Total Instructional Personnel:	14		$ 570,000	28		$ 1,125,000	39		$ 1,621,400	50		$ 2,060,500	61		$ 2,547,300
Total Admin, Support and Instructional Personnel:	17		$ 765,000	35		$ 1,555,000	47		$ 2,161,400	59		$ 2,609,500.00	71		$ 3,153,300

Benefits	Year 1			Year 2			Year 3			Year 4			Year 5		
	Number of	Cost Per	Total	Number of	Cost Per	Total	Number of	Cost Per	Total	Number of	Cost Per	Total	Number of	Cost Per	Total
Administrative & Support Benefits															
Health Insurance	14	$ 1,495	$ 20,930	19	$ 1,495	$ 28,405	25	$ 1,495	$ 37,375	30	$ 1,495	$ 44,850	36	$ 1,495	$ 53,820
Retirement Plan--NC State	14	$ 1,495	$ 20,930	19	$ 1,495	$ 28,405	25	$ 1,495	$ 37,375	30	$ 1,495	$ 44,850	36	$ 1,495	$ 53,820
Retirement Plan--Other	0		$ -	0		$ -	0		$ -	0		$ -	0		$ -
Life Insurance	0		$ -	0		$ -	0		$ -	0		$ -	0		$ -
Disability	14	$ 1,495	$ 20,930	19	$ 1,495	$ 28,405	25	$ 1,495	$ 37,375	30	$ 1,495	$ 44,850	36	$ 1,495	$ 53,820
Medicare	14	$ 1,495	$ 20,930	19	$ 1,495	$ 28,405	25	$ 1,495	$ 37,375	30	$ 1,495	$ 44,850	36	$ 1,495	$ 53,820
Social Security	14	$ 1,495	$ 20,930	19	$ 1,495	$ 28,405	25	$ 1,495	$ 37,375	30	$ 1,495	$ 44,850	36	$ 1,495	$ 53,820
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*** Edit text as needed. ***			$ -			$ -			$ -			$ -			$ -
Total Admin and Support Benefits:			$ 104,650			$ 142,025			$ 186,875			$ 224,250			$ 269,100
Instructional Personnel Benefits															
Health Insurance	14	$ 1,495	$ 20,930	19	$ 1,495	$ 28,405	25	$ 1,495	$ 37,375	30	$ 1,495	$ 44,850	36	$ 1,495	$ 53,820
Retirement Plan--NC State	14	$ 1,495	$ 20,930	19	$ 1,495	$ 28,405	25	$ 1,495	$ 37,375	30	$ 1,495	$ 44,850	36	$ 1,495	$ 53,820
Retirement Plan--Other	0		$ -	0		$ -	0		$ -	0		$ -			$ -
Social Security	14	$ 1,495	$ 20,930	19	$ 1,495	$ 28,405	25	$ 1,495	$ 37,375	30	$ 1,495	$ 44,850	36	$ 1,495	$ 53,820
Disability	14	$ 1,495	$ 20,930	19	$ 1,495	$ 28,405	25	$ 1,495	$ 37,375	30	$ 1,495	$ 44,850	36	$ 1,495	$ 53,820
Medicare	14	$ 1,495	$ 20,930	19	$ 1,495	$ 28,405	25	$ 1,495	$ 37,375	30	$ 1,495	$ 44,850	36	$ 1,495	$ 53,820
Life Insurance	0		$ -	0		$ -	0		$ -	0		$ -			$ -
*** Edit text as needed. ***			$ -			$ -			$ -			$ -			$ -
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*** Edit text as needed. ***			$ -			$ -			$ -			$ -			$ -
Total Instructional Personnel Benefits:			$ 104,650			$ 142,025			$ 186,875			$ 224,250			$ 269,100
Total Personnel Benefits:			$ 209,300			$ 284,050			$ 373,750			$ 448,500			$ 538,200

Total Admin & Support Personnel (Salary & Benefits):	3		$ 299,650	7		$ 572,025	8		$ 726,875	9		$ 773,250.00	10		$ 875,100
Total Instructional Personnel (Salary & Benefits):	14		$ 674,650	28		$ 1,267,025	39		$ 1,808,275	50		$ 2,284,750	61		$ 2,816,400

TOTAL PERSONNEL:	17		$ 974,300	35		$ 1,839,050	47		$ 2,535,150	59		$ 3,058,000	71		$ 3,691,500

*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.

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
Office			
Office Supplies	$ 10,000.00	$ 10,000.00	$ 12,000.00
Paper	$ 4,000.00	$ 8,000.00	$ 12,000.00
Computers & Software	$ 15,000.00	$ 12,000.00	$ 10,000.00
Communications & Telephone	$ 6,000.00	$ 6,000.00	$ 6,500.00
Copier leases	$ 20,000.00	$ 20,000.00	$ 20,000.00
Other	$ 5,000.00	$ 5,000.00	$ 5,500.00
*** Insert rows and edit text as needed. ***			
Management Company			
Contract Fees	$ 140,000.00	$ 200,000.00	$ 400,000.00
Other	$ -		
*** Insert rows and edit text as needed. ***			
Professional Contract			
Legal Counsel	$ 1,000.00	$ 1,000.00	$ 1,000.00
Student Accounting	$ -	$ -	$ -
Financial	$ -	$ -	$ -
Other			
*** Insert rows and edit text as needed. ***			
Facilities			
Facility Lease/Mortgage	$ 200,000.00	$ 250,000.00	$ 400,000.00
Maintenance	$ -	$ -	$ -
Custodial Supplies	$ 1,000.00	$ 2,000.00	$ 2,000.00
Custodial Contract	-	$ -	$ -
Insurance (pg19)	$ 3,000.00	$ 4,000.00	$ 4,500.00
Playspace		$ 7,000.00	$ 20,000.00
*** Insert rows and edit text as needed. ***			
Utilities			
Electric	$ 10,000.00	$ 10,000.00	$ 12,000.00
Gas	$ 10,000.00	$ 10,000.00	$ 12,000.00
Water/Sewer	$ 10,000.00	$ 10,000.00	$ 12,000.00
Trash	$ 4,000.00	$ 4,000.00	$ 5,000.00
Other	$ 10,000.00	$ 10,000.00	$ 12,000.00
*** Insert rows and edit text as needed. ***			
Transportation			
Buses	$ -	$ -	$ -
Gas	$ -	$ -	$ -
Oil/Tires & Maintenance	$ -	$ -	$ -
Other	$ -	$ -	$ -
*** Insert rows and edit text as needed. ***	$ -	$ -	$ -
	$ -	$ -	$ -

Other			
Marketing	$ -	$ -	$ -
Child nutrition	$ -	$ -	$ -
Travel	$ -	$ 2,000.00	$ 3,000.00
Association & Professional Dues	$ 500.00	$ 1,000.00	$ 1,500.00
BOD Expenses		$ 2,000.00	$ 2,000.00
Total Administrative & Support Operations:	$ 449,500.00	$ 574,000.00	$ 953,000.00

OPERATIONS BUDGET: Instructional	Year 1	Year 2	Year 3
Classroom Technology			
Classrooom/Student Devices	$ 10,000.00	$ 10,000.00	$ 12,000.00
Software (LMS, SIS, etc.)	$ 3,000.00	$ 4,000.00	$ 5,000.00
Wifi Access (Remote Applicants ONLY)			
Other	$ -	$ -	$ -
Instructional Contract			
Staff Development	$ -	$ 46,000.00	$ 62,000.00
*** Insert rows and edit text as needed. ***			
Books and Supplies			
Instructional Materials	$ 30,000.00	$ 90,000.00	$ 90,000.00
Curriculum/Texts	$ 2,000.00	$ 2,000.00	$ 2,500.00
Testing Supplies	$ 5,000.00	$ 5,000.00	$ 6,000.00
*** Insert rows and edit text as needed. ***			
Total Instructional Operations:	$ 50,000.00	$ 157,000.00	$ 177,500.00

TOTAL OPERATIONS:	$ 499,500.00	$ 731,000.00	$ 1,130,500.00

**Applicants may amend this table and the position titles to fit their Education and Operations Plans.*

Year 4	Year 5
$ 12,000.00	$ 14,000.00
$ 14,000.00	$ 15,000.00
$ 12,000.00	$ 12,000.00
$ 6,500.00	$ 7,000.00
$ 20,000.00	$ 20,000.00
$ 6,000.00	$ 6,500.00
$ 584,467.00	$ 714,348.00
$ 1,000.00	$ 1,000.00
$ -	$ -
$ -	$ -
$ 550,000.00	$ 650,000.00
$ -	$ -
$ 2,000.00	$ 2,000.00
$ -	$ -
$ 5,000.00	$ 5,500.00
$ 3,000.00	$ 3,000.00
$ 14,000.00	$ 15,000.00
$ 14,000.00	$ 15,000.00
$ 14,000.00	$ 15,000.00
$ 5,500.00	$ 6,000.00
$ 12,000.00	$ 12,000.00
$ -	$ -
$ -	$ -
$ -	$ -
$ -	$ -
$ -	$ -
$ -	$ -

$ -	$ -
$ -	$ -
$ 4,000.00	$ 5,000.00
$ 2,000.00	$ 2,500.00
$ 2,000.00	$ 2,000.00
$ 1,283,467.00	$ 1,522,848.00

Year 4	Year 5
$ 12,000.00	$ 14,000.00
$ 6,000.00	$ 7,000.00
$ -	$ -
$ 74,000.00	$ 90,000.00
$ 90,000.00	$ 90,000.00
$ 3,000.00	$ 3,500.00
$ 7,000.00	$ 8,000.00
$ 192,000.00	$ 212,500.00

$ 1,475,467.00	$ 1,735,348.00

Overall Budget

SUMMARY	Logic	Year 1	Year 2	Year 3	Year 4	Year 5
Total Personnel	J	$ 974,300.00	$ 1,839,050.00	$ 2,535,150.00	$ 3,058,000.00	$ 3,691,500.00
Total Operations	M	$ 499,500.00	$ 731,000.00	$ 1,130,500.00	$ 1,475,467.00	$ 1,735,348.00
Total Expenditures	N = J + M	$ 1,473,800.00	$ 2,570,050.00	$ 3,665,650.00	$ 4,533,467.00	$ 5,426,848.00
Total Revenue	Z	#NAME?	#NAME?	#NAME?	#NAME?	#NAME?
Surplus / (Deficit)	= Z - N	#NAME?	#NAME?	#NAME?	#NAME?	#NAME?

PUBLIC SCHOOLS OF NORTH CAROLINA
State Board of Education | Department of Public Instruction

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: Treasurer

Signature: [signature]

Date: 4/25/25

Sworn to and subscribed before me this 25th day of April, 2025.

Notary Public: Haeran B. Robinson

My commission expires: May 15th, 2029.

Official Seal:

HAERAN B ROBINSON
MY COMMISSION EXPIRES
NOTARY
PUBLIC
MAY 15, 2029
WAKE COUNTY, NC