



### Application Preliminary Evaluation Packet

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

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

#### Subcommittee Members:

Eric Sanchez  
Robert McOuat  
Steven Walker  
Cheryl Turner  
Brian Smith  
Alan Hawkes  
Alex Quigley  
Greg Schermbeck  
Hilda Parlér  
Joe Maimone  
Glenn Allen  
Kristen Parker  
Mike McLaughlin  
Douglas Price  
Nicole Charles  
Deanna Townsend-Smith

Moore Montessori Community School - MMCS is a vibrant learning community, where diverse students build strong academic foundations, executive function skills, and trust in their abilities, in preparation for lives of joy and purpose in the 21st century.

**Date of Review:**

09/30/2016

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## NORTH CAROLINA CHARTER SCHOOL APPLICATION

# Moore Montessori Community School

**Public charter schools opening the fall of 2018**

**Due by 5:00 pm, September 19, 2016**

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

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

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

**APPLICATION DUE DATE/TIME**

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

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

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

**APPLICATION SPECIFICATIONS**

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

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

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Total External Evaluator Votes 74

Total Subcommittee Votes 74

CSAB Votes 74

Initial Screening 74

External Evaluator 75

Charter School Advisory Board Subcommittee 85

Overall Summary 87

## I. APPLICATION CONTACT INFORMATION

Name of proposed charter school: Moore Montessori Community School

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

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

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

Name of contact person: *Katherine Rucker*

Title/Relationship to nonprofit: *Founder*

Mailing address: 2517 3rd Street, NE  
Washington DC 20002

Primary telephone: 910-639-0067 Alternative telephone: 910-692-5921

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

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

County: MOORE

LEA: 630-Moore County Schools

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

No:

Yes:

If so, provide the name of the third party person or group. NC Public Charter School Accelerator

List the fee provided to the third party person or group. **None.**

Provide a **full** detailed response of the assistance provided by the third party person or group while preparing this application and when the assistance will end.

The NC Public Charter School Accelerator (NC Accelerator) is a special project of the Parents for Educational Freedom in North Carolina (PEFNC). They are privately funded through a variety of grants, and provide services to public charter schools in rural and underserved communities. The NC

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Accelerator provided training on how to write an application, as well as feedback on completed sections of the application through the writing process. Our partnership with the NC Accelerator will extend throughout the application and interview process, and into our planning year if we are accepted. The NC Accelerator continues to provide support through the first year of operation.

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

No:

Yes:

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

No:

Yes:

*Acceleration*

Yes:

No:

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

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

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

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

Yes:

No:

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

Yes:

No:

*What is the name of the nonprofit organization that governs this charter school?* Moore Montessori Community School

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

### **Grade Levels Served and Total Student Enrollment:**

*Projected School Opening: Year* 2018

*Month* August

*Will this school operate on a year round schedule?*

No:

Yes:

*Proposed Grade Levels Served and Total Student Enrollment (*

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5

Years)

<b>Academic School Year</b>	<b>Grade Levels</b>	<b>Total Projected Student Enrollment</b>
First Year	K,01,02	90
Second Year	K,01,02,03	110
Third Year	K,01,02,03,04	140
Fourth Year	K,01,02,03,04,05	170
Fifth Year	K,01,02,03,04,05,06	200

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

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

ksrucker  
*Signature*

Katherine Rucker, Founder  
*Title*

ksrucker  
*Printed Name*

09/18/2016  
*Date*



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<b>Section I: Application Contact Information Concerns and Additional Questions</b>	<b><u>Reviewer</u></b>	<b><u>Page Reference</u></b>
<u>90 students across three grade levels seems small. The applicant should provide additional background regarding this decision and how the school will be financial stable with the small student enrollment.</u>	<u>Greg Schermbeck</u>	<u>Grade Levels</u>
<u>Why K-6?</u>	<u>Hilda Parlér</u>	<u>Grade Levels</u>
<u>The low enrollment projections makes sense for the Montessori model but can the applicant remain financially sustainable?</u>	<u>Nicole Charles</u>	<u>Grade Levels</u>
<u>Where is the signature?</u>	<u>Douglas Price</u>	<u>Grade Levels</u>
<u>Concern about very low numbers for beudgeting</u>	<u>Joe Maimone</u>	<u>Grade Levels</u>

<b><u>Reviewer</u></b>	<b><u>Score</u></b>
<u>Eric Sanchez</u>	
<u>Robert McQuat</u>	
<u>Steven Walker</u>	
<u>Cheryl Turner</u>	
<u>Brian Smith</u>	<u>Pass</u>
<u>Alan Hawkes</u>	
<u>Alex Quigley</u>	
<u>Greg Schermbeck</u>	<u>Pass</u>
<u>Hilda Parlér</u>	<u>Pass</u>
<u>Joe Maimone</u>	<u>Pass</u>
<u>Glenn Allen</u>	
<u>Kristen Parker</u>	<u>Pass</u>
<u>Mike McLaughlin</u>	
<u>Douglas Price</u>	<u>Pass</u>
<u>Nicole Charles</u>	<u>Pass</u>
<u>Deanna Townsend-Smith</u>	

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## **II. MISSION and PURPOSES**

(No more than three total pages in this section)

### **Mission:**

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

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

MMCS is a vibrant learning community, where diverse students build strong academic foundations, executive function skills, and trust in their abilities, in preparation for lives of joy and purpose in the 21st century.

*Clearly describe the mission of the proposed charter school:*

Our mission is to provide an excellent and equitable free Montessori education to students from diverse backgrounds. The Montessori method educates the whole child through hands-on learning, collaborative work, and self-directed activity. Its 100% individualized curriculum supports the educational needs of each child, and promotes the critical thinking, executive function, and social-emotional skills students need to be successful in college and the ever-changing global economy.

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

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

Our primary goals in choosing our location and student body are (1) to provide a high-quality education option for which there is demonstrated need and demand; (2) to create a student body that is racially and socio-economically diverse, reflecting the demographics of the area; and (3) to close the achievement gap for low-income students and students of color.

To achieve these goals, we intend to locate MMCS in or around Aberdeen, a diverse, vibrant community with an achievement gap and limited education opportunities as compared with nearby towns.

Diversity is a foundational principle in a Montessori classroom, where children learn to collaborate with students of different ages, abilities, and backgrounds in an inclusive, welcoming environment. Our Targeted Student Population will reflect and celebrate the diversity of Aberdeen and Moore County: 40% African American, 30% Hispanic, and 30% White, with 50% free and reduced-price meal eligible, and 15% ELL students (NCES, 2016).\*

From our work over the past year engaging families, community leaders, elected officials, and potential funders, we have determined that there is both a NEED and DEMAND for excellent, equitable public Montessori education

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in Moore County.

High-quality options are a much-needed component of Moore County's education system. Despite Moore County's overall wealth, stemming from the affluent Pinehurst golf resort, its legacy of segregation continues to impact low-income communities of color. Because school assignment is determined by a feeder-model based solely on where students live and Moore County's subsidized housing is concentrated in racially and economically segregated areas, poor families are excluded from neighborhoods with better school options (Gilbert, 2014).

Persistent segregation is accompanied by an achievement gap between low-income students and their peers. In Moore County, academic achievement and income-level remain highly correlated (Appendix A). Students at schools in wealthier areas, like Pinehurst, have better educational outcomes. The opportunity gap is particularly pronounced at Aberdeen Elementary, one of the state's "Recurring Low-Performing Schools," where 75% of its students are not "career or college track" ready and 75% of students are low-income (NC School Report Cards, 2015). 60% of Aberdeen Elementary students are performing below grade level on the 3rd Grade Reading EOG, generally considered to be a make-or-break benchmark in a child's future success. (Fiester, 2010). Low achievement in reading has staggering lifelong consequences in terms of individual earning potential, global competitiveness, and general productivity.

By locating MMCS in Aberdeen we hope to offer parents of underserved children in the community most-convenient access to a free public Montessori education, while also attracting children from a variety of cultural, socio-economic, and racial backgrounds in nearby communities. Based on demand for Garden Montessori Preschool, we anticipate that middle and upper class families will seek out MMCS. (See Appendix A, O)

Families we have begun meeting expressed real interest in the Montessori approach. Based on initial positive responses from 150 families we are confident we can fill our school and build a waiting list. In addition, MMCS has already garnered the support of community leaders, as well as unanimous support of Aberdeen's elected Town Council and Mayor to locate in their community (Appendix A, O).

At MMCS, we believe true equity in education will result when children from different backgrounds learn together in an excellent school. MMCS will help diverse children build strong academic and social-emotional foundations upon which to live lives of joy and purpose in 21st century. This is something all families, regardless of background and financial situation, desire for their children.

\*See Appendix O for Works Cited page

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

MMCS's total projected enrollment by Year Five is 200 students in grades K-6. It is anticipated that students will come from the Moore County Public

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Schools LEA, representing 2.9% of that total K-6 student population (DPI State Planning Allotment Fiscal Year 2014-2015).

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

Like our local LEA, MMCS will use the N.C. Standard Course of Study as a guide for ensuring children's academic achievement meets and exceeds state standards. However, MMCS's education plan will differ from that of our local LEA in the following ways: we will implement a child-centered approach to classroom structure, teaching, learning, and assessments.

Beautiful, ordered, and inviting, the Montessori classroom is prepared intentionally to ignite the intrinsic joy of learning that Dr. Maria Montessori, the method's founder, believed motivated each child. From child-sized chairs to brightly colored materials arranged precisely on low shelves, each element of the classroom is designed to build a child's sense of independence. Working within the calm, peaceful environment, students practice concentration, self-discipline, respect for others and themselves, and joy in learning.

Students grow and learn together in mixed-aged classrooms: Primary\* (pre-K 3, pre-K 4, and Kindergarten); Lower Elementary (1st, 2nd, and 3rd grade); and Upper Elementary (4th, 5th, and 6th grade). In contrast to the LEA approach, in which teachers are assigned new children each year, Montessori students learn together in three year cycles, which allows the teacher time to understand the academic and social-emotional needs of each child.

In traditional classrooms, children are generally assigned seats, all receiving the same information from the teacher at the same time, as if the goal were factory assembly line employment. In contrast, our Montessori classrooms will feel more like a Google workplace, in which students move freely around the classroom to work on self-directed projects during an uninterrupted 3-hour work block: some receive small-group instruction from the teacher, others work together to conduct scientific investigations, while others practice independently on the floor with hands-on learning materials.

Highly-trained Montessori teachers develop personalized learning plans for each child, an individualized approach to learning that encourages children to persist with rigorous academic material until they demonstrate mastery, rather than the real pressure in traditional classrooms to move continually on to new material with the rest of the class. Students work through the sequenced curriculum at an appropriate pace, reflective of their own development (Appendix B). The curriculum is also vertically-aligned, so accelerated children are free to move on to new materials, while other students can receive more instruction, practice time, or interventions as needed. Students can't fall hopelessly behind when they are working on such a personalized plan; they will not be in danger of "dropped stitches" in their academic foundations.

While the Montessori method does not use formal tests and grades to assess a child's academic growth, teachers' daily data collection is essential to understanding each child's progress on his/her individual learning plan. Teachers will use Montessori Compass, an online performance management tool

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that maps the Montessori curriculum to Common Core Standards, to record each lesson the student has received and mastered. Throughout the year, the teacher will use this data to adjust instruction and communicate the child's progress and struggles to families.

\*In order to provide an authentic Montessori experience for our Kindergarten students, in light of the fact that NC does not currently have universal pre-K funding, we have established a partnership with our local Montessori preschool, The Garden Montessori Preschool, in which their 3- and 4-year old preschoolers will learn in our Primary classroom, but be enrolled in a private, half-day program. Kindergarten children will be enrolled in our full-day, publicly-funded program. (Appendix O)

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

**Purposes of the Proposed Charter School:** *In one page or less, describe how the proposed charter school will achieve one or more of the six legislated purposes, as specifically addressed in the NC charter school statute GS 115C-238.29A, and the proposed school's operations.*

*The Six Legislative Purposes of a Charter School are:*

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

1. At MMCS, Lead Teachers are empowered to shape the curriculum and school culture to best meet students' individual needs. Because Montessori teachers are trained as empirical observers of their students, essentially functioning as researchers studying each child's responses to the learning environment, we will invite Lead Teachers to conduct Teacher-led Research Projects (TRP) to contribute to the overall effectiveness of MMCS's Montessori approach. Each year, MMCS teachers will identify an area of focus, build their knowledge through reading, research and conferences, then develop and implement their TRP in the classroom. Lead Teachers will present their TRP findings to MMCS staff, Board, and interested community members.

In conjunction, we have established a relationship with Wildflower Montessori, a network of lab schools serving as research sites dedicated to advancing the Montessori Method in the context of the modern world. We will connect our Lead Teachers with the Massachusetts Institute of Technology-

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Media Lab researchers working on the Wildflower project, so that our teachers will have the professional opportunity to be on the forefront of innovations in Montessori education, piloting some of the new technology and materials the MIT-Media Lab is producing for the Montessori classroom (Fitzgerald, 2015).

MMCS will also offer promising Assistant Teachers who aspire to become certified Montessori teachers (called Teaching Fellows) support through a blend of apprenticeship, coursework, professional development, and mentorship to prepare them for the rewarding work of becoming a Montessori-certified teacher. Teaching Fellows will undertake intensive coursework during the summer, followed by a year-long apprenticeship in the classroom that includes ongoing mentoring and coaching. The Board will raise scholarship funds to help offset the cost. Over time, the Teaching Fellows program will create a career ladder within the school, as well as a local, more diverse Montessori teacher pipeline.

In addition, MMCS will offer its teachers opportunities for continued professional development through Montessori's global learning community via annual Association of Montessori International or American Montessori Society conferences, association memberships, and ongoing workshops.

3. A 2011 Wall Street Journal article highlights the so-called "Montessori Mafia," or the creative elite who attended Montessori schools, where the unique learning environment allowed them to follow their curiosity and creativity. The list includes Google founders Larry Page and Sergey Brin, Amazon's Jeff Bezos, as well as musical artists Beyonce, Taylor Swift, and Yo Yo Ma, among many others, who as Montessori students cultivated their unique potential (Sims, 2011).

Today, Montessori education--characterized by mixed-age classrooms, hands-on educational materials, and student-directed learning in a peaceful, collaborative environment--is a globally sought-after pedagogy, taught in over 110 countries worldwide. In the United States, however, Montessori is offered most frequently in private school settings, with some 4,000 private schools, as compared to 450 public options (Lillard, 2006). Unfortunately, this limits access to families who can afford the steep tuition, sometimes as high as \$30,000 a year. MMCS will be on the forefront of the movement to expand access to this world-class teaching method through high-performing public charter schools serving children from diverse backgrounds. MMCS will bring this highly-sought after form of education to families in Aberdeen who desire a learning environment that will help unlock their students' potential as innovative problem-solvers and creative leaders of tomorrow.

4. The Montessori method is an evidence-based approach to closing the opportunity gap: A 2006 study compared the outcomes of similar urban minority student populations, those in a public Montessori school with those who attended traditional schools as determined by a lottery, and demonstrated the Montessori students advantages in math and reading skills. In addition, Montessori students had excellent executive function, or the ability to adapt to changing or more complex problems, an important indicator of future school and life success (Lillard, 2006). Montessori students also demonstrated better outcomes on social and behavioral tests, and were kinder in interactions with their peers on the playground.

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### **Goals for the Proposed Charter School:**

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

Goal 1: At MMCS, 85% of students who enter at grade-level in reading will advance one grade level in reading each year. At MMCS, 70% of students who enter behind grade-level in reading will advance more than one grade level in reading each year, until they are on grade-level.

Rationale: Low achievement in reading has staggering lifelong consequences for students in terms of individual earning potential, global competitiveness, and general productivity (Fiester, 2010). Third grade reading ability is considered a make-or-break benchmark for a child's future success, when children must make transition from "learning to read" to "reading to learn."

Measure of Success: We will use the Pearson Developmental Reading Assessment, or a similar assessment, at the beginning, middle, and end of year to measure growth in students' reading proficiency. Results will be presented quarterly to the staff and Board.

Goal 2: At MMCS, 80% of students will demonstrate growth in executive function (EF) skills, including cognitive flexibility, working memory, and inhibitory control.

Rationale: Science has proven that brains are built, not born. Early childhood is a period of rapid brain development, and a critical time to strengthen executive function (EF), the learned ability to reflect prior to taking action or making a decision. Strong EF is a key predictor of long-term success and productivity, allowing students to work effectively with others, persevere through distractions, and process multiple demands. Children who struggle with EF are often labeled as disruptive, hyperactive, and have poor academic performance. Studies have shown how the Montessori classroom is a highly-effective environment for children to strengthen EF. (Harvard Center for Developing Child, 2016; Reflection Sciences Overview, 2016; Lillard, 2006)

Measure of Success: We will use the Minnesota Executive Function Scale (MEFS), a five-minute assessment to pre-screen each child's EF skills at the beginning of the year. We will also use MEFS to track students' growth throughout the year, and for an end of year assessment. Results will be presented quarterly to the staff and Board.

Goal 3: MMCS will have at least five Family Engagement Opportunities each year to foster relationships of trust and open communication between MMCS and its families.

Rationale: Family involvement is a key component of an effective Montessori education, as it impacts student achievement and development. Events may include Take Your Family to School Night, as well as workshops on topics such as Montessori 101, Understanding Toxic Stress in Childhood, and Positive Parenting Techniques.

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Measure of Success: MMCS will track attendance at Family Engagement events and request survey feedback from families about the relevance of events. Results of Family Engagement work will be presented to the Family-Teacher Association and Board at its Annual Meeting.

Goal 4: MMCS will maintain an average daily attendance rate of 95%.

Rationale: Daily school attendance is a leading indicator of academic success and family engagement. Chronic absence matters as it predicts lower achievement in future years and can be a signal of major family stressors (Fiester 2010).

Measure of Success: MMCS staff will identify and work with families who have high absentee rates to ensure students have reliable transportation to school, a primary care medical home, and other necessary supports. Attendance rates will be included in monthly Board updates and annual report.

Goal 5: MMCS will apply sound financial discipline in all aspects of school budgeting, including operating on a budget that includes an annual contingency fund of at least 5% of per pupil funding.

Rationale: Proper financial management is critical to the success of a charter school.

Measure of Success: MMCS Board of Directors will approve an annual budget that includes a contingency fund of at least 5% of that year's expected per pupil funding.

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

Each quarter, the Board will receive and review quantitative data as proxy indicators of progress towards the school's stated goals, which will help the Board determine if the school is on-track with its students in terms of building foundational literacy and math skills, as well as developing increased executive function. In addition, the MMCS Board will have regular monthly meetings with the Head of School to ensure the school is working towards attaining its mission. At these meetings, the Head of School's update will include a current budget review, along with monthly cash on hand, revenue, and expenditure updates; the successes and challenges of implementing a high-fidelity Montessori program in the classroom; ongoing supports for ELL and EC students; and updates on community and parental engagement. At meetings, the Board will be guided by the following questions:

- (1) Are our students demonstrating ongoing Academic Progress?
- (2) Are our students developing improved Executive Function?
- (3) Are we managing our resources responsibly and effectively to help the school achieve its mission?

In addition, due to the unique nature of the Montessori teaching model, Board Members will be expected to observe in our Montessori classrooms twice a year.



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<b>Section II: Mission and Purposes Concerns and Additional Questions</b>	<b>Reviewer</b>	<b>Page Reference</b>
Do these percentages align with the US Census?	Brian Smith	Mission Stat
No mention of Montessori in mission?	Joe Maimone	Mission Stat
The applicant provides quality data to support demand and academic need for this school. The applicant should provide additional information regarding the projected student enrollment and how it will plan to stay financially sustainable.	Greg Schermbeck	Educational
Attached for review purposes is a map outlining the current charter schools. Additionally, the map provides an overview of the general placement of proposed charter schools for the 2018 school year: <a href="http://www.dpi.state.nc.us/charterschools/schools/map">http://www.dpi.state.nc.us/charterschools/schools/map</a> .	Deanna Townsend-Smith	Educational
The applicant should provide clear data points and measurable student outcomes for each purpose. The related documentation is helpful but provides broad strokes and is not incredibly specific.	Greg Schermbeck	Purposes of
Montessori focus is a defining purpose	Joe Maimone	Purposes of
Although the purposes are meaningful and manageable, how specifically are student outcomes monitored given the no test model of the Montessori model	Nicole Charles	Purposes of
What is the contingency plan for students that fall behind the school's goals? Are your goals similar to the district in your area?	Brian Smith	Goals for th
How will the board ensure they are not involved in the day to day operation?		
Measure of Success: We will use the Minnesota Executive Function Scale (MEFS), a five-minute assessment to pre-screen each child's EF skills at the beginning of the year. We will also use MEFS to track students' growth throughout the year, and for an end of year assessment. Results will be presented quarterly to the staff and Board.	Joe Maimone	Goals for th
Applicant needs to clarify: For students who are behind grade level what does advance more than one grade level in reading each year mean? Is it 1.5 grade levels? At least 2 grade levels?	Kristen Parker	Goals for th
Is it realistic to attain students who reach at least one full grade level ahead in reading? Is there justification that this is truly attainable?	Douglas Price	Goals for th
Are the gains required in the goals catered to each student?  What does "more than one grade-level" mean in terms of gains?  What is the plan for students unable to make gains in the time frame proposed?	Nicole Charles	Goals for th
The applicant provides clear and measurable goals but does not explicitly connect these goals to how to the governing board.	Greg Schermbeck	Goals for th

<b>Reviewer</b>	<b>Score</b>
Eric Sanchez	
Deanna Townsend-Smith	
Steven Walker	
Cheryl Turner	
Brian Smith	Pass
Alan Hawkes	
Alex Quigley	
Greg Schermbeck	Pass
Robert McQuat	
Nicole Charles	Pass
Douglas Price	Pass
Mike McLaughlin	
Kristen Parker	Pass

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Glenn Allen	
Joe Maimone	Pass
Hilda Parlér	Pass

### **III. EDUCATION PLAN**

(No more than ten total pages in this section)

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

#### **Instructional Program:**

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

Over a century ago, Dr. Maria Montessori began working with children who were considered the most at-risk youth in Italy's lowest socio-economic neighborhoods. Refined over a period of 50 years, the Montessori method combined her empirical observations of child development and desire to create an inclusive, peaceful, child-centered learning environment that honors children's natural desire to learn.

Montessori respects the student by allowing him/her "freedom with responsibility" within a structured learning environment and the opportunity to practice continually deepening his/her knowledge, character, and socio-emotional and executive function skills. We believe that at-risk children as well as children from diverse backgrounds in our community stand to benefit from this personalized, world-renowned curriculum, on which MMCS's instructional program is built.

Our high-fidelity Montessori curriculum will emphasize language development, mathematical thinking, peaceful problem solving, and physical, social and emotional independence (Appendix B). It will include the following instructional program components: student-centered learning environments; 100% differentiated, standards-aligned curriculum; beautiful hands-on learning materials; multi-aged groupings of students learning in 3-year cycles; 3-hour uninterrupted daily work blocks, in which music and art are seamlessly incorporated into core academic work; individualized and small group instruction; and explicit social-emotional skill-based instruction. In addition, our school will employ assessment protocols that allow us to track academic achievement, as well as improved executive functioning through multiple indicators, including daily observation, formative and summative assessments, online record keeping, and personalized student profiles, work journals, and portfolios.

The Montessori method has proven effective in engaging students in their own learning and increasing academic achievement over the past century. It is also an evidence-based approach to closing the opportunity gap: A 2006 study compared the outcomes of similar urban minority student populations, those in a public Montessori school with those who attended traditional schools as determined by a lottery, and demonstrated the Montessori students' advantages in math and reading skills, as well as executive function, or the ability to adapt to changing or more complex problems, an indicator of future school and life success. Montessori students also demonstrated better outcomes on social and behavioral tests, and were kinder on the playground

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(Lillard).

### **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.*

MMCS creates peaceful, child-centered, multi-age learning environments that foster the academic, social, and emotional development of students and produce life-long learners. Some of the basic elements of Montessori learning environments include:

**Multi-aged Classrooms:** The Montessori learning environment is structured somewhat differently from traditional schools. For example, 3, 4, and 5 year olds will learn together in the Primary classroom. Elementary students are grouped into Lower Elementary (ages 6,7,8) and Upper Elementary (9,10,11). Typical class size is 25 to 30 students, with a Lead Teacher and Assistant Teacher. The benefits of multi-age groupings are many: teachers work with the same students over a 3-year cycle, thus becoming very familiar with the child. Younger children have the benefit of observing the work of older students, while older children get to serve as role models and teachers, another outlet to practice and consolidate their own knowledge. Also, children do not feel a sense of being behind others as everyone is working at their own, personalized level.

**Hands-On Learning:** In the Montessori classroom, materials are designed to be beautiful and engaging to children to draw them into learning, as well as to support cognitive development as children progress from concrete to abstract concepts. Materials have an internal control of error so that children using them receive immediate feedback allowing them to check their own work independently. Through the use of Montessori materials, children develop and refine small and large muscle control, memory skills, and socialization skills, as well as the ability to concentrate, self-regulate, and manage time independently.

**Three-hour Work Blocks:** Another structural difference of the Montessori classroom is the three-hour, uninterrupted work block. This extended work period allows for children to build focus and attention skills while working independently on academic skills, rather than shifting from one topic to another in 50 minute increments. Montessori classrooms are designed to support "flow," or optimal experience theory. Psychologists describe "flow" as the mental state of operation in which a person performing an activity is fully immersed in a feeling of energized focus, full involvement, and enjoyment in the process of the activity (Kahn; Rathunde & Csikszentmihalyi). Children working in flow exhibit spontaneous discipline, concentration and deep engagement. During three-hour work blocks, the teacher has the flexibility to give small group and one-on-one instruction. A Montessori teacher is trained not to interrupt a child working, and understands that a child learning through mistakes and self-correcting in real time is an effective way to support deeper learning. Montessori teachers are trained to know when and how to make adjustments in a child's work.

Provide a synopsis of the planned curriculum, including:

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

In accordance with the North Carolina Accountability Model, MMCS's emphasis on academics is designed with the goal of ensuring our diverse student body (i.e. targeted population) is performing on or above grade level in math and language arts by the completion of third, fourth, fifth, and sixth grade and that students meet or exceed expected growth in language arts and math as measured by EOGs. Additionally, the Montessori curriculum meets and exceeds the requirements of the Common Core.

Montessori students will develop personalized learning plans with guidance from experienced teachers in order to progress through the aligned curriculum at a pace reflective of the child's own development and ongoing mastery. For each lesson, students will have the opportunity to practice with hands-on materials (and additional guidance from other students or the teacher) until they reach mastery of the concept. This individualized approach to teaching and learning encourages children to work on rigorous academic material until they demonstrate mastery, rather than giving in to the real pressure in a traditional classroom to move continually on to new material.

Each classroom is designed as a "mini-society" that meets the developmentally-appropriate needs of its students. For example, the Primary classroom is a "living room" for children, characterized by a spirit of joyful learning. Students work in the areas of Practical Life (to develop task organization and cognitive order through care of self, environment, exercises of grace and courtesy, and physical movement); Sensorial (to classify differences using manipulatives to explore size, color, sound, taste, temperature, and musical pitch); Mathematics (to recognize patterns and relationships using manipulatives to understand concepts of number, symbol, sequence, and operations); and Language (to understand and love language through oral language development, vocabulary games, creative writing, reading, grammar, and children's literature). Elementary classrooms build on the Primary experience, yet reflect the child's developing intellect, morality, and ability to think abstractly. In these classrooms, students learn through the integration of the arts, sciences, geography, history and language. Knowledge is presented as part of a large-scale narrative that unfolds the origins of earth, life, human communities, and modern history and human achievement, alongside the formal scientific language of zoology, botany, anthropology, geography, geology. In short, the elementary child is exposed to accurate, organized information, respecting of his/her intelligence and interests.

In addition, MMCS's Montessori curriculum prepares our diverse students for the global 21st century, equipping them with the knowledge, skills,

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mindsets, and executive function necessary to succeed in college, the workplace, and in their families and communities. Self-directed Montessori learners have practiced continually navigating their learning environment and know how to set goals for themselves and work diligently to accomplish goals; manage time throughout the day and week; balance temptation for socializing with the need to focus and concentrate on purposeful work; solve problems that inevitably arise as they move around the classroom to use materials and return them to the shelves; collaborate with others to resolve conflicts in partnerships and small groups; and employ research skills to help ask and answer questions for themselves so they learn how to learn. (Adapted from Montessori For All)

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

MMCS teachers will master the following instructional strategies (as developed by the Montessori For All charter network) in order to help ensure academic success for all Primary and Elementary students in the school, regardless of background, developmental needs, and initial academic levels:

(1) Before the school year begins, the Head of School and Instructional Coach will collaborate with Lead Teachers to map NC/Common Core standards to the Montessori scope and sequence, which all Montessori-trained teachers study intensively (see Appendix B). If gaps are identified in the Montessori scope and sequence, teachers will work together to find or develop Montessori materials that teach the standards.

(2) Teachers will use Montessori Compass, our online classroom performance management system, to develop spreadsheets for each grade level and subject with the scope and sequence of objectives and materials across the top and student names down the side.

(3) Teachers will identify benchmarks that each student must meet in every subject by a specific point in the year to ensure that each student is on track to meet or exceed goals for EOG tests, as well as school performance goals.

(4) Within ten days of the beginning of school, teachers will administer diagnostic assessments to determine each student's individual starting place in every subject and on executive function skills.

(5) In small groups or one-on-one, teachers will introduce individual students to the most appropriate starting place within the aligned curriculum and to the corresponding Montessori lessons and materials for their level.

(6) At the start of each week, teachers will support Elementary students as they plan their goals and assignments for the week. Students will use a Work Journal Record to keep track of which level they are on with regard to each material in each subject area (Appendix B).

(7) During a 3-hour work block, teachers will present new lessons, observe students, and meet with students one-on-one to check their work and assess

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mastery, while students practice independently with materials. Teachers provide the next lesson in sequence when students demonstrate mastery.

(8) Teachers use Montessori Compass (on iPads or tablets) to enter data about each student into the tracking sheets for every subject, allowing teachers to tell at a glance where every student is in every subject.

(9) Lead teachers will meet once a week to review and analyze student data from the week, in order to plan how best to meet students' needs the following week, which may include remediation, intervention according to MMCS's RTI protocols, or acceleration.

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

At MMCS, we want our students to be prepared to live lives of purpose and joy in the 21st century, as well as to meet the demands and expectations of a constantly-changing global workplace. Therefore, we will provide them with child-centered learning environments in which to practice continually building solid academic foundations, as well as their independence, time-management, emotional self-regulation, peaceful conflict resolution, critical thinking, and problem solving skills.

In order to ensure that students are mastering academic material in the Montessori curriculum and on track to transition from grade to grade, Lead Teachers will use following assessment methods:

**Instant-Feedback Materials:** Once a material is presented in a lesson to the child, he/she can then use the material independently. Many materials have a built in "control for error," so the child can see where a mistake was made and repeat the exercise self correcting, supporting deeper learning of the concept. Control of error components include checking labels and charts and physical objects that only fit together when assembled properly.

**Daily Teacher Observations and Data Collection:** Montessori teachers are trained to observe closely how children work on the materials as a way to determine competency. Three times a year, teachers will share their observations with families in a Narrative Progress Report, which is a written evaluation of the student's work, social development, mastery of academic skills, and suggestions for future progress. The report will be shared with families at fall and spring conferences and year's end. It will also be included in student's records.

**Tracking Performance Management System:** Montessori Compass will be implemented to allow teachers to track real time student progress through the Montessori scope and sequence. This also offers a helpful tool for communicating student progress to families.

**Third-Party Tests and Assessments:** In addition to state required EOGs, MMCS will use third-party tests and assessments to ensure students are ready to transition from grade to grade. These tests will include the Pearson Developmental Reading Assessment and the Minnesota Executive Function Scale.

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

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*how grade-point averages will be calculated?*

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

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

MMCS will have 185 days of school, totaling of 1240 hours, with extended school days Monday through Thursday from 8:30 am to 3:45 pm, and an early release on Fridays at 1:00 pm. Extended days allow MMCS to provide a three-hour uninterrupted morning work cycle and a slightly shorter afternoon work cycle for students, along with ample time for recess, lunch, and community building. Early release on Fridays provides crucial time for professional development, including teacher planning and data-driven decision-making. In its first year, MMCS will have two weeks of Teacher Training and Preparation. Teachers will have three work days at the end of the school year. Teacher-Parent conferences will be held once in the Fall, and once in the Spring. School will begin August 20 and release June 11.

### **Special Programs and "At-Risk" Students**

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

MMCS will implement Response to Intervention (RTI), a framework used for providing comprehensive support to students and the early identification and support of students with special learning and behavioral needs. Successful implementation of RTI includes a combination of high quality culturally- and linguistically-responsive instruction, assessment, and evidenced-based intervention. Comprehensive RTI implementation will improve instructional quality, result in more meaningful identification of learning and behavioral difficulties, and provide all students with the best opportunities to succeed within the Montessori environment. RTI complements the Montessori method as Montessori teachers are already highly-trained to make regular adjustments to a child's learning plan based on their daily observations and formative assessments of students. In addition, in the Montessori model, all students already have personalized learning plans and access to one-on-one and small-group instruction.

#### **Phase I: High-Quality, Core Instruction**

The RTI scaffolded approach begins with high-quality Montessori instruction and baseline screening of all students in the classroom. In the first two weeks of school, all children will be assessed using the Pearson Developmental Reading Assessment (DRA), the Minnesota Executive Function Scale, as well as teacher-led observation and formative assessments. Based on data from assessments and observations, teachers develop personalized learning plans for all students, using Montessori Compass, an online classroom performance management tool, which will allow teachers to know at-a-glance where each child is in terms of mastery of standards. The standard Montessori curriculum is applied through uninterrupted work periods, hands-on learning materials, small group learning, individual instruction, and student choice. In this phase, individual teachers problem-solve by making ongoing adjustments to personalized learning plans in ways that support each child's academic development.

#### **Phase II: Strategic Support Interventions (SSI)**



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The goal of Phase II is to identify obstacles to student learning, and minimize or eliminate these obstacles. Students who are identified as not responding to adjustments in core Montessori instruction (primarily reading and math) are placed in strategic intervention to receive additional support. SSIs are based on the students needs, base-line levels of performance, and rate of progress. Additionally, students who test one full year behind grade level on the Pearson DRA automatically will be placed in SSI. Support strategies may include more frequent small-group and one-on-one instruction and RTI individual case management at weekly teacher meetings under the guidance of Lead Teachers and the Exceptional Child Coordinator.

#### Phase III: Evaluation

Students who do not respond to strategic support interventions of Phase II will be referred for comprehensive evaluation and considered for eligibility for special education services under the Individuals with Disabilities Education Improvement Act of 2004, which may include development of a 504 accommodations plan and/or Individualized Education Program.

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

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

Every student at MMCS will receive rigorous, high-quality personalized instruction regardless of English Language Proficiency. In order to meet the needs of our English Language Learner (ELL) population, we will ensure that teachers are qualified to implement effective instruction that allows students at all proficiency levels to access the Montessori curriculum while simultaneously building academic language skills. We will identify, educate, and serve students and their families based on practices known to be effective and in line with federal and state regulations regarding the education of public school students designated as ELL.

In compliance with NC State Board Policy, GCS-K-000 (16 NCAC 6D.0106), each child and his or her family will be sent a Home Language Survey (HLS) to complete and submit at registration. Based on survey results, MMCS will identify ELL students, administer the WIDA ACCESS placement test, and develop an appropriate ELL plan to best serve the student. As necessary, based on results from the HLS, school forms will be provided in home language.

While all MMCS students will have individual learning plans, ELL students will benefit from differentiated instruction, a visible, print-rich environment, theme-based units of study, and vocabulary development. In the Montessori classroom, Lead Teachers will address essential reading, writing, speaking and listening skills and facilitate the development of the English language across content areas. Additional specific supports for ELL students include delivering the Minnesota Executive Function Scale in the most proficient language for the child. ELL students' plans will include specific steps for monitoring and evaluating progress. Teachers will use RTI to elevate ELL students in Phase I who are not responding to core instruction adjustments into Phase II for supplemental support. Students who demonstrate

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the ability to participate fully in the learning environment will be tested, and those who meet the specified score based on NC State Board policy GCS-A-012 will exit the ELL program.

At MMCS, because we are seeking an intentionally diverse student community, and based on demographics of our intended school location, we are prepared to serve 15% of children from homes where English is not the primary language spoken. The Montessori method, particularly in early childhood years when the brain is programmed for language acquisition, is an excellent program for students who are learning a new language. Teachers are trained to present materials and lessons for young children with consistency, using specific, repeated phrases, and precise vocabulary in the environment. Nationwide, many Montessori schools choose to introduce a second language through immersion teaching. While MMCS will not be implementing a dual-language program, we will be using the same techniques that would be utilized in such a program to assist our ELL students. Workshops on supporting ELL students in Montessori classrooms will be presented during summer professional development and ongoing support for ELL teachers will be provided by the Instructional Coach.

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

There are no limits to the learning an academically gifted child can pursue in a Montessori classroom. Trained Montessori teachers are taught two years beyond the scope and sequence of their teacher certification in order to serve academically gifted children. For example, a Primary Montessori teacher (Kindergarten) is trained to teach mathematical concepts as advanced as division of fractions, parts of speech, and diagramming sentences. In addition, each classroom contains materials to support advanced learning.

Montessori teachers support accelerated student-led research projects in ways that foster literacy, math and science skills as fueled by childrens' curiosity, intrinsic desire to learn, and ability to choose to focus on what interests them most. As children move from concrete to abstract thinking, Montessori Elementary teachers are trained to harness the joy of discovery and inclinations to "think big" that mark the natural development of children ages 6-12. For example, teachers might encourage accelerated students to work in school hallways using long strips of paper to measure in hundreds of feet the relative size of the solar system, or create a timeline of the creation of the universe, or solve exceptionally long math problems.

Teachers will use individual learning plans to monitor and evaluate the progress of academically gifted children as they learn. Accelerated students will not be limited by grade level or the ability of fellow classmates, as is often the case in traditional classrooms. As children in Upper Elementary classrooms master Common Core standards and move into more advanced mathematics and sciences, teachers will be able to incorporate Khan Academy online lessons into the individual learning plans to support continued progress for academically gifted children. Khan Academy includes over 100,000 practice exercises and instructional videos on topics ranging from

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chemistry to calculus to art history, using state-of-the-art, adaptive technology that identifies students' strengths and learning gaps (Khan Academy, 2016).

Dr. Maria Montessori developed her curriculum to build fluency in literacy and math, the languages of knowledge in her time. However, to best prepare MMCS students for 21st century jobs and opportunities, we will add a third fluency: binary code. In conjunction with Montessori Wildflower experts, MIT professor Sep Kamvar is currently developing materials to teach the newly developed computation scope and sequence starting at the Primary level. MMCS will integrate these lesson plans and the full complement of materials into the learning environment to teach students the foundations of computer science. While the fluency of computation will not be limited to academically gifted students, it is another accelerated opportunity for curious, motivated students.

### **Exceptional Children**

*The public charter school cannot deny admission to any child eligible for special education services as identified under the federal legislation Individuals with Disabilities Education Improvement Act (IDEA), IDEA regulations, and Article 9 115C of the North Carolina General Statutes, North Carolina Policies Governing Services for Children with Disabilities. **All public schools are responsible for hiring licensed and 'highly qualified' special educators pursuant to law.** Public schools are required to provide a full continuum of services to meet the unique needs of ALL students with disabilities.*

### **Identification and Records**

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

MMCS will meet all applicable state and federal requirements including the Individuals with Disabilities Education Improvement Act (IDEA), Section 504 of the Rehabilitation Act, G.S 115C-238.29F(g)(5) and the 'Child Find' mandate. Exceptional students and those who are found to qualify for services under Section 504 will be provided with programs implemented in accordance with state policies and procedures. All students with disabilities, regardless of the nature or severity of their disability, who need special education and related services, will have their needs met in the least restrictive environment possible. As stated in our budget, MMCS will hire an Exceptional Child Coordinator (and other contracted resources as needed) to work with exceptional students; coordinate psychological and/or educational testing to meet the needs of exceptional students; and address the therapeutic needs of exceptional students as these services are found necessary. School registration paperwork will include a section to indicate if a child has an IEP or IFSP from previous school. The Exceptional Child Coordinator (ECC) will manage the transfer of student files. ECC will

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use CECAS, a case management and data analysis system that will allow for streamlined data collection and reporting.

MMCS will implement the following procedures in accordance with the Individuals with Disabilities Education Act's 'Child Find' mandate: (1) 'Child Find' posters and brochures will be posted and readily available in the main office. (2) When a teacher identifies a student who may be eligible for special education services through Response To Intervention (RTI) protocol, he/she recommends the child to MMCS's Student Support Team (SST), which will include the child's teacher, a second teacher to provide an unbiased perspective, Head of School, and ECC. (3) SST will complete a pre-progress evaluation through CECAS, and based on observations, implement appropriate strategies and supports from RTI, including adjustments to environment, behavioral supports, and instruction. A child's hearing and vision will also be screened if no current records are on file. SST will determine length of intervention period, typically six weeks. (4) If RTI adjustments do not work (and there are no hearing or vision difficulties), SST reviews documented observations and meets with parents/guardians to share pre-progress evaluation results and suggest an educational evaluation. Evaluations will be provided by licensed professionals in their respective fields, to include but not limited to: psychologist, speech therapist, occupational therapist, physical therapist, audiologist. If guardians agree to evaluation, a 90-day period begins to complete recommended evaluations. (5) After 90 days, the SST and parents have an Eligibility Determination Meeting, at which time the licensed professional may recommend creating an IEP. (6) An IEP meeting is scheduled to be attended by parents/guardians, SST, and licensed professional. The licensed professional and SST set goals for the child, identifying the supports and services needed and specified timeframe. All IEPs will be evaluated at least annually and revised as needed by the SST. All students receiving special education services will be reevaluated at least once every three years.

MMCS's ECC will be responsible for requesting records from previous schools. Students at MMCS with recognized disabilities will be afforded all rights in regard to confidentiality of their records as provided by state and federal law. Student files are kept in a secure location in a locked cabinet. Only ECC and Head of School have keys. A record of access sheet will be posted on the cabinet for anyone who takes the file out for review. ECC will use compliance protocols provided by NCDPI EC Division.

### Exceptional Children's Education Programming

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

The Montessori method was originally developed to serve exceptional children and was one of the first education programs in the world to integrate special education programming into traditional classrooms. As a Montessori program, MMCS is committed to inclusion and providing a full continuum of

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services to exceptional children within the classroom whenever possible and most beneficial. Our Student Support Team (SST), comprised of the Exceptional Child Coordinator (ECC), teachers, and Head of School, will determine the best and least restrictive environment based on the child's IEP and the specific exceptionality. Lead Teachers will collaborate closely with the SST to implement the IEP and appropriate adaptations.

At MMCS, exceptional children will receive Free Appropriate Public Education (FAPE) from appropriately trained teachers and paraprofessionals who will provide services for the eligible special needs children. The school will contract with carefully-vetted Certified/Licensed Providers to be selected based on the needs of eligible children and their IEP requirements. Review of progress and any changes to IEP will be determined in communication with parent/guardians and SST.

Progress will be monitored on a consistent basis, and will be reported quarterly to parents/guardians. Minutes will be kept at all meetings, and parents will receive all minutes and forms. Fidelity checks will be conducted on a regular basis by the ECC in reference to program implementation. Related services will be provided as dictated in student IEPs; MMCS will contract/hire licensed providers and assistive technology as required by IEP and determined necessary by SST. Parent-suggested technology is not paid for by the school. Addendum meetings will be held as needed to adjust the therapies or technologies.

### **Student Performance Standards**

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

1. Student Performance Standards will ensure that by the time students complete 6th grade at MMCS they are on track to succeed in middle school, high school and ultimately enroll in the college and engage in the career of their choice.

#### **Literacy:**

85% of students who enter MMCS reading at grade level per the Pearson Developmental Reading Assessment Second Edition (DRA) pretest will advance one full grade level in reading each year per DRA year-end test.

70% of students who do not enter MMCS reading at grade level per the DRA pretest will advance in excess of one grade level, every year, until they read at grade level per DRA year-end test.

#### **Math:**

K-2 students will demonstrate a year of growth through mastery of Montessori

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math curriculum. Growth will be evidenced by yet-to-be selected math assessment, as well as teacher observation and data collection, student work samples, and progress reports.

By end of Year Three, and consequently moving forward, 75% of tested MMCS students will perform at or above grade level on 3rd grade NC EOGs in math.

By end of Year Six, 75% of all tested MMCS students will perform at or above grade level on NC EOGs in math.

Science:

By end of Year Four, and consequently moving forward, 75% of MMCS students will test at or above grade level on science EOGs.

Executive Function Skills:

80% of students will show growth on the Minnesota Executive Function Scale (MEFS), which measures cognitive flexibility, working memory, and inhibitory control. Growth will be evidenced through a process that includes MEFS pre-test, ongoing tracking, and MEFS end of year test.

2. In addition to state required EOGs, MMCS will use third party tests and teacher assessments to ensure students are progressing toward achieving standards, and prepared to transition from grade to grade. These tests will include the Pearson Developmental Reading Assessment and the Minnesota Executive Function Scale, among others. MMCS will pretest and post-test with both assessments to track annual student growth in academic and social-emotional areas. MMCS will use data-driven decision making to identify areas of academic weakness, and make regular adjustments to the instructional methods for each child, according to our RTI protocol. In quarterly professional development meetings, staff will review collected data to assess the overall effectiveness of the Montessori curriculum in meeting the needs of our diverse target population, and make adjustments accordingly.

3. MMCS will also use data-driven decision making to determine a child's readiness to be promoted based on mastery of the Montessori curriculum, as aligned with NC and Common Core Standards. Parents will be informed that in multi-aged Montessori classrooms, the main promotion for students occurs from Primary to Lower Elementary, and from there to Upper Elementary. MMCS will inform parents that student promotion is at the recommendation of the Lead Teacher with approval by the Head of School, based on student's social and academic development, as evidenced by student work, teacher observation, and continuing assessments. Students with special needs will be promoted according to protocol established in their IEPs.

4. We expect our first cohort of children to exit our school in 6th grade in year 2022/23, by which time students will have completed five years of personalized, hands-on Montessori learning. Students exiting 6th grade will be expected to demonstrate at least 80% mastery of the Montessori Elementary Curriculum, as it is mapped to the NC and Common Core Standards. Exit standards for our "At-Risk" populations are similar, with additional considerations taken into account for students IEPs, 504 Plans, ELL status, specific disabilities, and any other relevant factors. MMCS students will be prepared to meet the academic and social-emotional demands of middle school, high school, and beyond.

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### **Student Conduct:**

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

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

*Be sure to include:*

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

MMCS will strive to create a school culture and community modeled on the peace and respect for self, others, and the environment, which is at the heart of the Montessori method. MMCS will teach positive, healthy behavior through the Montessori Grace and Courtesy lessons in all classrooms. These lessons are taught proactively, as well as in response to certain behaviors manifesting in the classroom. Children apply these lessons to practice respectful communication and work in a peaceful community of learners. Staff will model Grace and Courtesy behaviors, and parents will be invited to participate while on campus to serve as role models for students.

Less serious behaviors to be addressed within the classroom include: interfering in others' work, failure to follow directions, inability to complete work assignments, and inability to resolve conflict with peers. The teacher will provide correction based on the Montessori method, which may include redirection, reminders, and limiting privileges for some amount of time. When appropriate, the Peace Corner, a designated area of the classroom where children take turns talking and listening, will be used to resolve conflicts arising between students.

More serious behaviors that will not be tolerated include fighting, bullying, profane or vulgar language, stealing, cheating, arson, harassment, sexual misconduct, possession of a real, lookalike, or pretend weapon or firearm, possession or sale of alcohol or drugs, intoxication, threats of violence, leaving campus without permission or notification, and class disturbance in excess. These behaviors will be addressed immediately whenever possible with the teacher, parent and Head of School through creation of a behavior plan, by which all efforts will be made to ensure positive behavioral changes and resolution. In the event that the student is not able to meet behavioral expectations and/or the student's or another student's education is compromised as a result, the Head of School will consult with the Board of Directors on a possible suspension.

Should the Board deem necessary extended suspension of greater than 10 days, the student's family will have the right to appeal the Board's decision through the following grievance process: An appeal may be made to the Board within five school days of the notice of the Head of School. The appeal

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shall be in writing and limited to the issues raised at the hearing before the Head of School. The Board shall notify the parent/guardian of the date when the Board will hear the appeal, making every reasonable effort to hear the appeal within seven days of the request. The Board may select two or more board members to hear the appeal on behalf of the entire Board. The parent/guardian and the Head of School may attend the hearing to argue their respective positions. The Board may decide the appeal on record or may receive additional testimony and evidence as needed, making every reasonable effort to render a written decision within five school days. The decision of the Board shall be final, except an adverse decision by the Board may be appealed by the student to a court of law as provided by statute.

In the event that a child with special needs exhibits behavior which, if the child were not a child with special needs, could result in the suspension of the child from school for a period of more than ten school days or for consecutive periods that total more than ten school days, the school shall require a multidisciplinary team promptly to review the evaluation already completed for the child and conduct any additional evaluations necessary to determine if the behavior is caused by the child's special needs, including if the child is receiving appropriate education presently or whether medication is needed or current medication needs adjustment. (Adapted from Island Montessori Student Handbook)



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<b>Section III: Education Plan Concerns and Additional Questions</b>		
The applicant should provide additional information regarding the proposed assessment strategies and their relation to the instructional curriculum.	Greg Schermbeck	Instructiona
Excellent: Multi-aged Classrooms: The Montessori learning environment is structured somewhat differently from traditional schools. For example, 3, 4, and 5 year olds will learn together in the Primary classroom. Elementary students are grouped into Lower Elementary (ages 6,7,8) and Upper Elementary (9,10,11). Typical class size is 25 to 30 students, with a Lead Teacher and Assistant Teacher. The benefits of multi-age groupings are many: teachers work with the same students over a 3-year cycle, thus becoming very familiar with the child. Younger children have the benefit of observing the work of older students, while older children get to serve as role models and teachers, another outlet to practice and consolidate their own knowledge. Also, children do not feel a sense of being behind others as everyone is working at their own, personalized level.	Joe Maimone	Instructiona
Applicant needs to clarify: What specific assessment strategies will be used to support instructional progress for students?	Kristen Parker	Instructiona
Although the applicant beautifully describes the approach, can data and resources about how the model works for at-risk and EC students?	Nicole Charles	Instructiona
Where is the documented evidence to support the proposed approach and how it provides improved student performance?	Douglas Price	Instructiona
Appendix B is attached and provides a great amount of detail regarding the instructional program. The applicant should include additional detail regarding how their instructional program will ensure success for a wide range of learners.	Greg Schermbeck	Curriculum a
Is there documentation of successful M programs in NC or US?	Joe Maimone	Curriculum a
Given the grouping of students by age rather than grade, how can the plan be translated to allow the board, the state, and laymen to assess the quality of education and student outcomes?	Nicole Charles	Curriculum a
While there is a lot of "data" about multi-grouping thrown about in this application, where is the citation for support and statistics that agree with the statements made?  Further, can the applicant please provide explicit data on how having large groupings of 25-30 per class is: - innovative for education - enhances student learning for the better - enhances teaching quality	Douglas Price	Curriculum a
NC now uses a Multi-Tiered System of Support. Since the school proposed to follow "NC Responsiveness to Instruction," how does the proposed model align to the NC approved system of support? What adjustments will the school make or will the RTI model continue to be used?	Brian Smith	Special Prog
What is your process for when a parent requests an evaluation or Special Educatoin Services?	Glenn Allen	Exceptional
Can families request evaluations or are they solely school staff driven?  Although the general pieces are inn place to serve exceptional students well, can the applicant review the IEP team requirements and the 90 day rule which begins at the point of request?	Nicole Charles	Exceptional
There may be some confusion on the 90 day time line. The timeline begins the day the referral is made or the day a parent puts the request in writing. The eligibility meeting and determination is to be made within the 90 days.	Glenn Allen	Exceptional
Does MMCS have an assessment for students with I.E.P to ensure the goals are met?	Nicole Charles	Exceptional
The applicant should provide additional information regarding how data will be leveraged within the individualized plans to ensure student success.	Greg Schermbeck	Exceptional
Applicant needs to clarify: What specific data will be used to monitor student progress on IEPs?	Kristen Parker	Exceptional
Can the applicant please address what math assessment tool will be used?	Douglas Price	Student Perf

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Can the applicant speak more on what "tracking" for Executive Function Skills looks like?		
Applicant needs to clarify: What specific data sources will be used to monitor student progress?  Applicant needs to clarify: Will students be given grades? How will these grades be determined to ensure all students are on track to meet the goals outlined?	Kristen Parker	Student Perf
It is mentioned that there are additional considerations for students with disabilities but no clear method or plan is provided as it related to promotion and retention. What is your plan?	Glenn Allen	Student Perf
The applicant should explain the additional assessments and models will be used to ensure student success.	Greg Schermbeck	Student Perf
How will student's grade levels transferring in or out be determined to ensure consistency?	Brian Smith	Student Perf
How are the performance standards adjust for at-risk or exceptional students?  Can the applicant specify how data is used to adjust students plans especially for at-risk or exceptional students?	Nicole Charles	Student Perf
Multi-aged Classrooms: The Montessori learning environment is structured somewhat differently from traditional schools. For example, 3, 4, and 5 year olds will learn together in the Primary classroom. Elementary students are grouped into Lower Elementary (ages 6,7,8) and Upper Elementary (9,10,11). Typical class size is 25 to 30 students, with a Lead Teacher and Assistant Teacher. The benefits of multi-age groupings are many: teachers work with the same students over a 3-year cycle, thus becoming very familiar with the child. Younger children have the benefit of observing the work of older students, while older children get to serve as role models and teachers, another outlet to practice and consolidate their own knowledge. Also, children do not feel a sense of being behind others as everyone is working at their own, personalized level.	Joe Maimone	Student Cond
The applicant should provide more detail regarding the student conduct and discipline policy. The applicant should clearly state how this policy will differentiate at different grade levels and positive incentives that will be used to ensure proper behavior.	Greg Schermbeck	Student Cond
Why would the Head of School consult with the Board of Directors about a suspension? In the event that a child with special needs exhibits behavior which, if the child were not a child with special needs, could result in the suspension of the child from school for a period of more than ten school days or for consecutive periods that total more than ten school days, the school shall require a multidisciplinary team promptly to review the evaluation already completed for the child and conduct any additional evaluations necessary to determine if the behavior is caused by the child's special needs, including if the child is receiving appropriate education presently or whether medication is needed or current medication needs adjustment. (Adapted from Island Montessori Student Handbook)Did the parents give consent?	Brian Smith	Student Cond
IS the section addressing discipline for special needs children designed to function as the manifestation determination? MMCS should ensure that their policy aligns with laws for special education students	Nicole Charles	Student Cond
The application mentions the need for medication or medication adjustment. Please refer to the prohibition on mandatory medication NC 1501-15.5 or pages 50 and 51 of the Policies Governing Services for students with disabilities. How specifically will the school handle discipline for students with disabilities when there is a change of placement based on accumulation of 10 day suspensions or any suspension of 10 days or more. Again, please refer to the Policies Governing Services for Students with Disabilities.	Glenn Allen	Student Cond
Applicant needs to clarify: A few strategies are listed for student behaviors but are there specific structures that students will be asked to follow? How will students be monitored during the 3 our independent work time?	Kristen Parker	Student Cond

Reviewer	Score
Alex Quigley	
Robert McOuat	

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Brian Smith	Pass
Cheryl Turner	
Steven Walker	
Deanna Townsend-Smith	
Eric Sanchez	Pass
Nicole Charles	Pass
Douglas Price	Pass
Mike McLaughlin	
Kristen Parker	Pass
Glenn Allen	Fail
Joe Maimone	Pass
Hilda Parlér	Pass
Greg Schermbeck	Pass
Alan Hawkes	

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**IV. GOVERNANCE and CAPACITY**

(No more than ten total pages in this section)

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

**Governance:**

**Private Nonprofit Corporation:**

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

*Name of Private Nonprofit:* Moore Montessori Community School

*Mailing Address:* Moore Montessori Community School

*City/State/Zip:* Southern Pines NC 28387

*Street Address:* 185 Lauren Lane

*Phone:* 910-692-5921

*Fax:* 000-000-0000

*Name of registered agent and address:* Ellen Stewart  
185 Lauren Lane  
Southern Pines, NC 28387

**FEDERAL TAX ID:**

**Tax-Exempt Status 501 (c)(3)**

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

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

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

**Governance and Organizational Structure of Private Non-Profit Organization:**

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

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

<b>Board Member Name</b>	<b>Board Title</b>	<b>County/State of Residence</b>	<b>Current Occupation</b>	<b>Past or Present Professional Licenses(s) Held</b>	<b>Has any disciplinary action been taken against any of these professional licenses?</b>

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Katherine Rucker	Chairperson	Out of State	Graduate Student		
Rebecca Ledley	Vice Chairperson	Out of State	Chaplain		
Margaret 'Peggy' Johnson	Secretary	MOORE	Professor		
Dr. Benjamin Greene	Treasurer	MOORE	Professor		
Dr. Sarah Brewington		MOORE	Pediatrician		

**Please provide the following in this location of the APPLICATION:**

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

The MMCS Board of Directors will serve as the school's governing body. The Board will decide on strategic matters that affect the academic, fiscal, and organizational health, as well as sustainability of the school, including but not limited to approving the annual budget, curriculum, and operating procedures, as well as hiring, firing, retaining, and setting compensation for the Head of School. The Board will carry out its duties as outlined in Article V, Section 9 of its Bylaws. Officers of the Board, as outlined by Article VII will include Chairperson, Vice Chairperson, Secretary, and Treasurer. The Head of School will serve as an ex officio, non-voting member of the board. Roles and responsibilities of Officers include the following:

The Chairperson assumes responsibility for overall functioning of the board, coordinating the full board's activities and committees so the board achieves its goals and operates in accordance with its Bylaws. He or she presides at board meetings and serves as a liaison between the Head of School and Board to ensure strong communication and coordinated efforts.

The Vice Chairperson assists with the overall functioning of the board and serves as an advisor and deputy to the Chairperson. In the event that the Chairperson is absent, the Vice Chairperson assumes the duties and exercises the powers of that office.

The Secretary ensures accurate documentation exists to meet legal requirements, as well as communicates with board members about meetings, records and maintains minutes of all proceedings, keeps board records and important documents, and maintains bylaws and charter agreement.

The Treasurer oversees all matters related to the school's finances, aligning all financial transactions with the mission, goals, bylaws and legal requirements of the school. He/she communicates information needed for

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board members to make financial decisions for the school.

Initial committees established may include Executive, Nominating, Finance and Audit, the structures of which are outlined in Article X of Bylaws.

One of the Board's primary functions is to hire and support a strong leader as Head of School. The Head of School will be responsible for overall operation of the school; authorized to oversee all employees and recommend their hiring and dismissal to the Board of Directors; responsible for compliance with the charter of the State of North Carolina, as well as ensuring MMCS is in compliance with all NCDPI testing regulations; and keeping the Board informed of overall progress of the school as well as its financial and material needs, among other responsibilities (outlined in Bylaws Article VII, Section 5). To ensure exceptional school leadership, the Board will (1) recruit and hire the right leader who can lead and manage the school to achieve its goals; (2) cultivate an effective partnership between the Head of School and Board chair, so that challenges can be addressed proactively; and (3) champion the school leader in the community to assist with development. The Board will evaluate and hold the Head of School accountable through the following process: collaborating with Head of School to establish his/her annual goals; evaluating the leader each year using a formal, transparent process, which will be based on achieving concrete results as well as feedback from 360 degree reviews; and investing in his/her ongoing professional development in pursuit of his/her stated goals for the school community.

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

MMCS's founding Board of Directors includes five members: Katherine Rucker (Founder and Chairperson), Rebecca Ledley (Vice Chairperson), Ben Greene (Treasurer), Peggy Johnson (Secretary), and Sarah Brewington (Director). The board will maintain a composition of five to eleven members, which may be increased by majority vote of the Board. The powers and duties of the Board are outlined in Article VII of Bylaws.

MMCS's current governing board includes diverse background expertise in education, community organizing, school operations, national charter school expansion and development, and rural community health and wellness. The Board has a combined 79 years of experience teaching and leading/operating schools. The Board's diversity of experience, perspectives and expertise will ensure the leadership necessary to carry out MMCS's mission, goals and key objectives. Furthermore, the Board's commitment to ensuring that all students in Moore County have opportunities for high-quality education, combined with its passion for increasing public access to high-quality Montessori education will motivate the Board to carry out its duties with strategic focus and dedication.

The Board is currently in the process of recruiting additional dynamic board members with legal and financial expertise, and, in the interim, has engaged a number of local and national experts for strategic guidance and advice, including support from the North Carolina Public Charter School Accelerator

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Program.

To ensure the school will be an educational and operational success, the Board will govern to fulfill MMCS's mission and the promises of its charter. With a relentless focus on student achievement, the Board will review indicators of student success regularly to measure progress toward school goals. Quantitative measures of success aligned with the school's stated academic, financial and operational goals will include our agreed upon definition of academic excellence, along with dashboard indicators such as daily student attendance, quarterly academic progress reports from the Head of School, staff and parental climate surveys, and budget updates including a financial feedback loop monitoring revenue and expenses, timing of cash flow, and balances in accounts, and annual EOG results.

The Board will hire and support a strong Head of School, who can lead the school towards achieving its goals. The Board will supervise, evaluate, and hold accountable the Head of School through the following means: collaborating with Head of School to establish his/her annual goals; evaluating the leader each year using a formal, transparent process, which will be based on achieving concrete results as well as feedback from 360 degree reviews; and investing in his/her ongoing professional development in pursuit of his/her stated goals for the school community. The Board will also work to build a diverse coalition of community champions for MMCS by recruiting and engaging a wide variety of local partners and supporters within the community through the Board's extensive personal and professional local networks, as already demonstrated through the letters of community support included in Appendix O. In addition, the Board will ensure active and effective representation of key stakeholders, including parents by encouraging community members and parents to take leadership roles in helping the school achieve its mission through active engagement, committee representation, and FTA participation.

The Board will also work to ensure its own effectiveness by recruiting and maintaining a slate of outstanding community board members who bring diverse perspectives and skill sets; engaging in ongoing board development and new member orientation and training; and assessing individual and collective board performance through an annual self-reflective survey and guided conversation.

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

MMCS Board founder, Katherine Rucker, recruited each Board member according to his/her expressed alignment with MMCS's mission and goals and the unique skills and talents he/she will contribute as governing Board members. As expressed in Article V, Section 6 of Bylaws, "New Board members will be nominated and voted on by the Board by criteria defined by the Board. If a vacancy occurs in the Board, the remaining Board may fill the vacancy by a majority vote of the remaining Board. The new member of the Board will then serve the remainder of the unexpired term of the member of the Board who is being replaced." Replacement members who are recruited and selected will need to meet minimum monthly commitments, bring diverse background and skills, and believe in and be committed to the mission of MMCS.

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

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In accordance with Article VI, Section 1 of the Bylaws, MMCS Board meetings will be held monthly, and the times and dates will be established during the annual board meeting.

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

As outlined in MMCS Bylaws (Article V, Section 9), one of the Board's duties is to provide all Board members with the information and training needed to perform effectively. Therefore, the Board will develop a board member manual, as well as a variety of orientation/training strategies, such as New Board member orientation; ongoing board education training; mini-seminars on special interest topics; and access to pertinent publications and conferences, particularly Montessori-relevant conferences. New Board member orientation will include briefings on the origins of the school, its mission, goals, and the Montessori method, as well as information about the community in which we serve, and an overview of the school's progress towards achieving its academic, fiscal and operational goals. Resources presented will include toolkits on Board Governing Basics developed by Charter Board Partners and the National Charter School Resource Center, among others.

Additionally, the Board will seek out relevant, annual professional development, which will include (1) participating in required training webinars presented by NCDPI Office of Charter Schools, so that all Board members will be informed about relevant policy developments and resources made available through NCDPI and other sources; (2) engaging the expertise of Danielle Boudreau, a national charter board governance expert of PM Strategies, who specializes in helping entrepreneurial "founding" charter boards transition through the stages of growth to become a high-functioning "sustaining" board; and (3) identifying additional partners, organizations, and expert leaders who can guide the Board as it continually assesses and learns how to be a more effective and exemplary Board. In terms of timeline, the MMCS Board will receive training on governance, financial oversight, operations, and legal responsibility a month prior to the beginning of each school year, supplemented with professional development deemed most relevant to the success of MMCS on a quarterly basis.

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

As outlined in MMCS Bylaws, Article VIII, all Board members, the Officers, and all other management personnel and committee members of the Corporation shall acknowledge and agree by signature to abide by the Code of Conduct and Conflict of Interest Policy. Each individual covered by this policy shall submit an annual Certificate of Compliance to the Chairperson of the Board. Any member of the Board, officer, or member of a committee with governing Board delegated powers, who has direct or indirect financial interest, as defined in Bylaws, is an interested person (see Appendix G). A financial interest is not necessarily a conflict of interest. A person who has a financial interest may have a conflict of interest only if the appropriate governing Board or committee decides that a conflict of interest exists.

In connection with any actual or possible conflict of interest, an



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interested person must disclose the existence of the financial interest and be given the opportunity to disclose all material facts to the directors and members of committees with governing Board delegated powers considering the proposed transaction or arrangement. After disclosure of the financial interest and all material facts, and after any discussion with the interested person, he/she shall leave the governing Board or committee meeting while the determination of a conflict of interest is discussed and voted upon. The remaining Board or committee members shall decide if a possible conflict of interest exists. If a more advantageous transaction or arrangement is not reasonably possible under circumstances not producing a conflict of interest, the governing Board or committee shall determine by a majority vote of the disinterested directors whether the transaction or arrangement is in the Corporation's best interest, for its own benefit, and whether it is fair and reasonable.

Existing relationship: The Founder/Chairperson and Vice Chairperson are sisters. In the event that there is an actual or perceived conflict of interest, these parties will recuse themselves as required by MMCS Bylaws, Article VIII: Code of Conduct and Conflict of Interest.

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

The Board will first implement important policies as required by North Carolina law, the Articles of Incorporation, and the charter contract. The Board will then create policies as they align with MMCS's mission. According to our Bylaws, all matters before the Board shall be approved by a majority vote. Electronic vote by the Directors will be accepted and counted. All decisions will be vetted with the governing Board and approved in accordance with the MMCS Bylaws. To ensure that the Board is in compliance with legal and successful practices, the Board will recruit additional expertise from the community including lawyers and CPAs. This structure will ensure that the Board remains in compliance and effective as a governing body.

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

MMCS will develop a Family-Teacher Association (FTA) to facilitate family engagement through volunteering, fundraising, and establishing community partnerships. The FTA will aid in such things as planning and execution of fundraising events, sponsorship of school clubs and organizations, assisting in the organizing of special events, assisting in the sponsorship and running of after-school activities and Family Education Nights, and aiding in the upkeep and maintenance of the MMCS garden. The FTA will report to the Head of School. All interested parents or legal guardians of current MMCS students, as well as currently employed MMCS teachers are invited to be a part of the FTA. The FTA will act as an independent entity with its own elected leadership body, but may be assigned tasks or duties by the Head of School.

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

MMCS's general grievance policy for parents and staff is to meet with an immediate supervisor of the conflict to make a good-faith effort to resolve the matter. Parents should first meet with the child's teacher or Head of School. If a grievance still remains after the meeting, parents can request, in writing, to meet with the MMCS Board. Within 30 days of the grievance, the Board will communicate a time and place to all parties involved to meet. The final resolution will be determined by the Board. In the case of a staff member grievance, he or she will consult with their immediate supervisor in

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writing to express his or her concerns; then he or she will meet in-person to make a good-faith effort to resolve the issue. However, if a resolution is not finalized, the staff member has the right to meet with the MMCS Board through a written request. The Board will respond to the request within 30 days by scheduling a hearing of a place and time to the staff member. A final decision will be made by the Board as a result of the hearing and grievance process.

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

#### Include in the Appendices:

1. A well-defined organizational chart showing the relationship of the Board of Directors to the parents and staff of the proposed charter school. This chart should also include lines of authority to and from any outside entity that will play a role in managing or supporting the charter school (such as educational service providers, advisory bodies or parent/teacher councils). (Appendix E)
2. A one-page resume from each founding board member and responses to the questions found on the Charter School Board Member Form (Appendix F).
3. The proposed by-laws, which must include a Conflict of Interest Policy for board members and a stated commitment to the NC Open Meetings Law (Appendix G).
4. A copy of the articles of incorporation from the NC Department of the Secretary of State. (Appendix H)

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

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

**X Not Applicable**

**Private School Conversions: complete ONLY if the proposed charter is a private school conversion. Otherwise, mark "Not Applicable" and follow the direction #3 in the Application Specifications.**

**X Not Applicable**

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

**X Not Applicable**

### Projected Staff:

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

Head of School (1)

Lead Teachers (4)

Assistant Teachers (4)

Office Manager (1)

Part-time Instructional Support Coach (1)

Part-time Exceptional Child Coordinator (1)

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### **Staffing Plans, Hiring, and Management**

Include the following information for the proposed charter school:

MMCS's teachers are our school's most valuable asset. We will recruit and hire Montessori-trained Lead Teachers (Montessori Accreditation Council for Teacher Education or MACTE-certified) who have 3-5+ years of experience teaching in a Montessori setting. These Lead Teacher candidates will be sourced through a variety of channels: our deep connections within the national Montessori network, including top training centers such as Washington Montessori Institute, Northeast Montessori Institute, Montessori Institute of Atlanta, and Center for Montessori Teacher Education of North Carolina; Montessori job posting sites, such as AMI Teach; social media; and the AMI and AMS professional associations. We also plan to attend Montessori conferences, such as the AMI Annual Refresher Course to recruit candidates directly.

In addition, we intend that the makeup of the teaching staff over time reflects the diversity of our student body and community. Initially, we will aim to recruit two Teaching Fellow candidates who are NC-certified teachers, residents of our community, and highly-motivated to become certified Montessori teachers for our diverse school. Though we do not currently have the budget to pay for their Montessori training, we intend to raise funds to offset that cost during our planning year. Our recruited Teaching Fellow candidates would attend the first of three summer AMI-trainings in Atlanta and then apprentice under one of our Lead Teachers. Over time, the Teaching Fellows program will become a pipeline of diverse, local, well-trained Montessori teachers for our expanding school.

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

The Head of School will be the only employee who reports directly to the MMCS Board of Directors. The Head of School has the authority to recommend the hiring and the dismissal of instructional and non-instructional employees to the Board of Directors.

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

Recommendations for new hires will be made to the Board of Directors by the Head of School. A simple majority of Board member votes will be needed to approve the hiring of new employees. The MMCS Board of Directors will also be responsible for setting the salary of all new hires.

MMCS Board of Directors will require criminal history checks for all employees. Once identified to fill a position, all potential employees will have a background check. Candidates must present a satisfactory background check in order to proceed to the final stages of the hiring process.

The MMCS Board of Directors will hold official responsibility for the hiring and dismissal of employees. In addition, the Board will handle all employee grievance appeals. A simple majority of Board member votes will be needed to terminate the contract of an employee recommended for dismissal. Dismissed employees have the right to appeal their termination to the Board of Directors. Employees with grievances may also appeal any grievance decisions if they are not satisfied with the outcome of their initial grievance decisions. The Board of Directors maintains the right to accept or reject

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any grievance or termination hearing requests.

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

The following proposed salary and benefit ranges are for Year One of MMCS's operations:

\*Head of School: \$50,000 to \$60,000, based on experience, plus health benefits and 6% retirement plan match.

\*Office Manager: \$25,000 to \$35,000, based on experience, plus health benefits and 6% retirement plan match.

\*Lead Teachers: \$35,000 to \$45,000, based on experience, NC teaching licensure and Montessori certification, plus health benefits and 6% retirement match.

\*Assistant Teachers: paid at \$18 to 22 per hour, for an estimated 1200 hours of work per calendar year or 6.5 hours a day, no benefits.

\*Part-Time Exceptional Child Coordinator: \$20,000, no benefits.

\*Part-Time Instructional Coach: \$20,000, no benefits.

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

In the case of a staff member grievance, the staff member will consult with his/her immediate supervisor in writing to express his or her concerns; then the staff member will meet in person to make a good-faith effort to resolve the issue. However, if a resolution is not finalized, the staff member has the right to meet with the MMCS Board through a written request. The Board will respond to the request within 30 days by scheduling a meeting with the staff member. A final decision will be made by the Board as a result of the hearing and grievance process.

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

One Teacher Assistant will drive the school bus for morning and afternoon routes, as well as for field trips. He/She will have a Commercial Drivers License (CDL) and bus driver training, and be paid at his/her hourly rate for the additional hours of driving morning and afternoon bus routes.

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

Montessori teachers are trained to work within the classroom community with exceptional children and gifted students. ELL students will receive extra support through the RTI program as needed. MMCS will have a part-time Exceptional Child Coordinator to case manage IEPs and related accommodations for students.

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

Head of School should be mission-driven, invested in the Montessori approach to education as truly transformational for the child and the world, and prepared to work urgently toward closing the opportunity gap facing our target population. Candidate should be comfortable interacting with diverse families and setting the tone to create a welcoming and inclusive environment for each student and family. Head of School will:

\*Be responsible for the administrative success of all school programs.

\*Ensure that the school is in compliance with all applicable governmental laws and regulations.

\*Work with Lead Teachers to coordinate curricula and achieve educational goals.

\*Ensure that student progress through the Montessori curriculum is tracked, and that student data is collected on a regular basis and used to inform

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instructional decisions.

\*Serve as a liaison between teachers and parents to resolve classroom issues.

\*Maintain school discipline policy in consistent and respectful manner.

\*Serve as Business Manager for MMCS.

\*Apply for and maintain grants.

\*Oversee daily operation of school, ensuring a safe and peaceful environment.

\*Serve as non-voting member of the Board and keep the board informed of all aspects of school operations.

\*Communicate all Board policies and changes to staff.

MMCS Lead Teacher candidates will hold a Bachelors Degree, as well as Montessori Accreditation Council for Teacher Education-approved credentials; be state-certified or willing to complete alternate certification; and be comfortable interacting with diverse families and creating a welcoming and inclusive environment for all. Lead Teacher will:

\*Prepare and maintain an authentic Montessori learning environment to ensure academic growth for all students.

\*Plan and implement lessons.

\*Observe students and systematically track their progress to ensure success for every child.

\*Modify instruction to meet the needs of students with diverse backgrounds and learning styles.

\*Maintain a positive, productive, and safe learning environment through effective classroom management strategies.

\*Administer one-on-one assessments throughout the year (reading, etc.).

MMCS Assistant Teacher will gain the hands-on experience and training necessary to become a successful, full-time Lead Teacher. This role fulfills the Montessori certification practicum requirement. Assistant Teacher will:

\*Work with the Lead Teacher to prepare and teach in an authentic Montessori environment.

\*Plan and deliver lessons, providing feedback on work, and assessing students.

\*Supervise lunch in the classrooms, in addition to P.E./recess.

\*Collaborate with staff to plan lessons, organize field trips, analyze data, etc.

\*Maintain positive and productive relationships with families.

\*Communicate effectively with students, families, and other staff.

\*Assume other duties as they become necessary in a flexible, start-up environment.

MMCS Instructional Coach will have AMI or AMS certification at the Elementary Level I, 10 years teaching experience, and 5 years experience as a principal or instructional consultant at Montessori schools. Instructional Coach will:

\*Plan and facilitate professional development workshops that will help Lead Teachers improve instruction, assessments and classroom management practices based on individual teacher needs and school-wide goals.

\*Assist teachers with designing instructional and assessment practices that best align with Montessori and North Carolina Standard Course of Study for Math and English Language Arts.

\*Observe teachers in order provide on-going feedback and support.

\*Provide individualized, classroom-based coaching to Lead Teachers to help

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them support and implement good instructional practices.

The Exceptional Child Coordinator (ECC) will hold a Masters of Education in Special Education or related field and have 5 years of experience working with elementary aged children. ECC will serve as a case manager for exception children, handling all forms, scheduling, and coordinating of evaluation and service-delivery for exceptional children. ECC will be responsible for all record compliance and serve on the Student Support Team.

The Office Manager must have clerical experience and strong interpersonal communication skills. Candidate must be approachable and welcoming to students, staff members, parents and community members, as well as adept at managing customer concerns and effective at multi-tasking. Candidate will be responsible for managing student records.

### **Staff Evaluation and Professional Development**

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

The Head of School will be responsible for maintaining teacher licensure requirements and maintaining the schedule of professional development opportunities.

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

Teachers, who work with our students on a daily basis, are the most valued assets at MMCS. The administration, Board of Directors, and other staff will work to ensure that teachers and students have the time, space and support to work together safely and effectively each day. Interruptions into the learning environments (classrooms) will be discouraged, particularly during 3-hour work cycles. Lead Teachers will spend a majority of their time dedicated to preparing individual lessons plans and guiding students' academic and social-emotional growth in the learning environment. Additional requirements beyond teaching and supporting student growth will be minimal. Master Teachers (5+ years Montessori teaching experience) at each level will provide regular support for less-experienced Lead Teachers during Friday staff development time (1:30 to 4:00). The Montessori Instructional Coach, with input from teachers, will help craft a professional development plan that identifies each teacher's strengths and 2-3 goals for improvement per year. The Head of School and teachers will review the professional development plan and student progress on a regular basis.

The Board of Directors will develop a retention bonus program after Year One to be awarded to teachers with exceptional academic and social-emotional student outcomes in the classroom, in order to incentivize high-quality teacher retention and continuity in the classrooms.

In accordance with the Licensure Section of the North Carolina Department of Public Instruction, teachers with lateral entry provisional teaching licenses will be responsible for passing required exams and obtaining an individual plan of study as prescribed for lateral entry at a University with an approved teacher education program or one of the Regional Alternative Licensing Centers.

3. *Describe the core components of professional development plan and how these components will support effective implementation of the educational program. Describe the extent to which*

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*professional development will be conducted internally or externally and will be individualized or uniform.*

The core components of our professional development program at MMCS will be focused on supporting diverse learners, identifying and addressing academic challenges in early literacy and math, mapping specific plans for growth for each child, and building positively-disciplined, respectful classrooms.

A part-time Montessori Instructional Coach will work with the Head of School to create a Professional Development plan that includes group workshops and one-on-one meetings during the two-week summer work session; regular classroom observations and assessments to support individual teachers; and workshops throughout the year to provide targeted support in areas identified for improvement.

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

Summer Professional Development for Lead Teachers, Assistant Teachers, Exceptional Child Coordinator, Instructional Coach, and Head of School

\*Day One

All Staff: Classroom Management; Positive Discipline Policy and Techniques; Training for Montessori Compass and Third-party Assessment Tools.

\*Day Two

Lead Teachers and Instructional Coach: Overview Montessori scope and sequence to support North Carolina Standard Course of Study for English Language Arts grades K-2.

Assistant Teachers and Peggy Johnson, Board Member and Montessori teacher trainer: Montessori Classroom Assistant Training.

\*Day Three

Lead Teachers and Instructional Coach: Overview Montessori scope and sequence to support North Carolina Standard Course of Study for Math grades K-2.

Assistant Teachers and Peggy Johnson, Board Member and Montessori teacher trainer: Montessori Classroom Assistant Training.

\*Day Four

All Staff: Supporting ELL in the Montessori Classroom; Addressing Classism in Early Education; Cultivating an Antiracist Classroom Community.

\*Day Five

Lead Teachers, Head of School, and Instructional Coach: Planning the Year, Collaborative Work Time.

All Staff & Families: MMCS Kick Off Pool Party.

\*Day 6 to 10

Lead and Assistant Teachers prepare environments and materials. Individual check-ins with Instructional Coach and Head of School. Lead Teachers provide orientations for individual students into classroom environment.

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

Professional development will occur throughout the MMCS school year, beginning with a 10-day Summer Work Session that includes professional development workshops designed and led by the Instructional Coach. During the school year, students will have early dismissal on Fridays to allow Staff Professional Development to occur from 1:30 pm to 4:00 pm. MMCS

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assistants and/or outside vendors will provide optional after school care for children during this time. In addition, MMCS has calendared three Teacher Work Days for targeted professional development workshops during the school year, as well as three Teacher Work Days at the end of the school year for staff to complete annual evaluations, reflections on the year, and goals for upcoming school year.

### **Enrollment and Marketing:**

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

### **Marketing Plan**

*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)).*

MMCS recognizes that the Montessori method is an innovative teaching method and new educational option in the community. Additionally, as we learned in our Listening Tour, many families in the community we aim to serve do not understand public charter schools. Therefore, the MMCS Outreach Team, to be comprised of Montessori educators and Board Members will work to educate the community on the benefits of Montessori and charter schools, and to ensure every potentially-interested family has an opportunity to address questions directly with an Outreach Team member.

The Outreach Team will follow the proposed Community Outreach Calendar, the primary goal of which is to use effectively the 24 months prior to August 2018 to inform families in Aberdeen and surrounding communities about MMCS. Outreach will encourage families to share contact information, visit the school website, or connect with a member of the Outreach Team by phone, and schedule to attend one of the monthly Family Education Nights. (Attending a Family Education Night is not required for enrollment at MMCS.) Additional Outreach strategies will include direct marketing via radio, print media, social media and flyers, as well as personal interactions facilitated through community groups, local festivals, church gatherings, and early childhood daycare and preschool centers.

#### **MMCS Community Outreach Calendar:**

Fall 2016: Continue to build partnerships with staff and families at early childhood education centers in order to recruit students: Partners for Children and Families (Smart Start program in Moore County), Boys and Girls Club of the Sandhills, and Family Promise of Moore County, a program serving homeless families in the area.

Winter 2016: Develop branding materials and roll out MMCS website, which will include parent education resources on Montessori, child development, charter schools, and MMCS's mission, as well as an online form to capture contact information from interested families.



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Spring 2017: Host information booths at local spring festivals, where MMCS Outreach Team answers questions, collects interested family information, and engages children with Montessori hands-on learning materials.

Summer 2017: Launch direct marketing campaign. Distribute easy-to-read flyers in English and Spanish that ask parents to imagine what future success looks like for their children, and connect to skills learned at MMCS. Distribute to Sandhills Pediatrics, Aberdeen Parks & Recreation, Aberdeen Library, local area churches, Southern Pines Library, Pinehurst Library, Southern Pines Department of Parks & Recreation, etc. Flyers will direct families to MMCS website for more information.

Upon SBE approval in August 2017: Outreach to local press for media coverage at Aberdeen Times, The Pilot, PineStraw Magazine, Star 102.5; and distribute second round of flyers in English and Spanish that include application process, open enrollment dates (January 15, 2018 to March 15, 2018), and enrollment deadline (March 15, 2018).

Fall 2017/Winter 2018: Connect by email or phone with families who have expressed interest over past two years, encourage them to sign up for a MMCS Family Education Night, which will be held monthly from September 2017 until March 2018. Family Education Nights (FEN) will include introduction to Montessori method, demonstration of hands-on materials, Q&A, and overview of school application paperwork. FENs from January to March will allow families to complete student application onsite. Meeting locations will include churches, preschools, day care centers, and community centers.

## **Parent and Community Involvement**

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

MMCS Outreach Team will follow the marketing plan to reach out to families in the communities we aim to serve. Prior to and during open enrollment, MMCS will host regular Family Education Nights to support a thorough understanding of the Montessori method, the role of a public charter school in the community, and the MMCS vision.

In August 2018 MMCS will schedule individual orientations for each child and his/her family at the school, in order to welcome families into the life of the school as valued education partners. The child will work individually with the Lead Teacher in his/her new environment, while the parent/guardian works with a MMCS staff person to complete school registration, including a confidential psychosocial screen. The screen will help MMCS determine food security and the stability and safety of the home. MMCS will encourage all incoming students to have a health assessment. In alignment with the school mission to support whole child development, MMCS will work to see that each student has a primary care medical home. Sandhills Pediatrics has agreed to provide health care assessments for our students, and has offered to provide a primary care medical home for any student needing one, regardless of the ability to pay.

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MMCS will communicate to parents in English and Spanish on a regular basis in the following ways: regular progress reports with a narrative of the child's progress and a snapshot of skills mastered and areas for improvement; two annual in-person parent-teacher conferences; annual classroom observations; and prompt email or phone communication from teachers and staff. In addition, the Elementary classrooms will produce a regular newsletter updating families on activities in the classroom and school.

MMCS will have at least five Family Engagement Opportunities each year to foster relationships of trust and open communication between MMCS and its families. Events may include Take Your Family to School Night, as well as workshops on topics such as Montessori 101, Understanding Toxic Stress in Childhood, and Positive Parenting Techniques. Sandhills Pediatrics has agreed to provide workshops for families to teach a systematic approach to positive parenting, which has been proven to reduce toxic stress and improve the quality of life and education performance for children.

The Family Teacher Association (FTA) will host family social events that align with the diversity of the school community. The FTA will develop and support volunteer opportunities for families including library management, gardening, supervising "Going Out" field trips as organized by Elementary students, fundraising, and community outreach.

## **Admissions Policy**

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

1. *Tentative dates for the open enrollment application period; enrollment deadlines and procedures. \*Please be advised schools cannot accept applications until after final approval from the SBE.*
2. *Clear policies and procedures detailing the open enrollment lottery plan including policies regarding statutory permitted student enrollment preferences.*
3. *Clear policies and procedures for student waiting lists, withdrawals, re-enrollment, and transfers.*
4. *Explanation of the purpose of any pre-admission activities (if any) for students or parents.*
5. *Clear policies and procedures for student withdraws and transfers.*

Moore Montessori Community School has a specific admissions policy that culminates in a lottery. Pending SBE approval, the open enrollment period for the first year will be January 15, 2018 to March 15, 2018. In general, the annual enrollment period will occur after January 1st and last for a minimum of 30 consecutive days, but no more than 60 consecutive days.

The following are requirements for eligibility: Any child who is qualified under the laws of this State for admission to a public school is qualified for admission to a charter school. Admission to a charter school shall not be determined according to the local school administrative unit in which a student resides. The student must not be currently under long-term suspension or expulsion. (Student can appeal to the charter school board for eligibility.) Students must be a resident of the State of North Carolina during the open enrollment period. Lottery enrollment form must be completed and submitted within the open enrollment dates.

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The application will contain basic information: Parent/guardians' name and contact information (address, phone and email); Student's name, birthdate and projected grade level.

The lottery will be hosted within three business weeks of the closing open enrollment date.

Applications received after the open enrollment date will be time stamped and placed on the waiting list in the order applications were received per grade level.

Student preferences:

Based on current charter school law, the following preferences shall be adopted into the lottery process:

\*Children of full-time employees and board members are automatically admitted, as long as there are openings in the grade level and it does not exceed 15% of total student body population.

\*Siblings of currently enrolled students who apply during the open enrollment period and are identified as a sibling of a currently enrolled student will be given enrollment preference in the upcoming academic year. If there are more siblings than openings in a particular grade level, a separate sibling lottery will be hosted to determine eligibility.

\*Multiple birth siblings shall apply as one applicant. If that application is pulled within the open enrollment lottery, all multiple birth siblings shall be admitted into the school, despite the number of openings. Multiple birth siblings will be added to the waiting list in alphabetical order by their first name.

The board will revisit and evaluate the admissions policy annually. During this review, the student preference policies will be addressed, including adopting any other lawful preferences.

No priority registration will be given to children currently enrolled in any private preschool program that share teachers, space, and materials within the MMCS primary classrooms. The private preschool enrollment process will be handled privately by The Garden Montessori Arts & Learning Preschool, LLC, or another privately held corporation (Appendix O).

Family Education Nights are informational and not a prerequisite for admission. Additionally, parent education and individual orientations for enrolled families are informational and not required for admission.

Student withdrawals are to be submitted in writing by parent or guardian to the Head of School. Once withdrawal paperwork has been completed it will be processed within two school days.

Any student wishing to re-enroll after an official withdrawal will be required to complete a new application for admission. Currently enrolled students do not need to re-apply but will be asked to communicate their intent to remain enrolled for the following school year. Student transfers will be processed in a timely manner with records being forwarded for students transferring out of MMCS. For students transferring into MMCS, once a completed application is on file and enrollment paperwork has been completed, records will be requested from the previous school.

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## **Weighted Lottery**

*Does your school plan to use a weighted lottery?*

Yes:

No:

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

- 1. In no event may a lottery process illegally discriminate against a student on the basis of race, religion, ethnicity, gender, or disability.*
- 2. A lottery process may not be based upon geographic boundaries, such as zip code or current public school attendance zones.*
- 3. A lottery process that deviates from the standard lottery must be based upon the school's unique mission and must be based upon educationally, psychometrically and legally sound practices, protocol and research.*

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

- 1. A thorough explanation of how the specific mission of the school, as set forth in the application, requires the utilization of the weighted or limited lottery.*
- 2. A thorough description of the processes and procedures the applicant intends to use to effectuate the lottery.*
- 3. The underlying research, pedagogical, educational, psychometric and legal, that supports the request and the procedures the applicant is requesting.*

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**PROJECTED ENROLLMENT**

**2018-19 through 2022-2023**

IDENTIFY LEA FROM WHICH STUDENTS WILL PROBABLY COME

LEA #1 Moore County Schools

LEA #2

LEA #3

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

	2018-2019			2019-2020			2020-2021			2021-2022			2022-2023		
	LEA 630	LEA 000	LEA 000	LEA 630	LEA 000	LEA 000	LEA 630	LEA 000	LEA 000	LEA 630	LEA 000	LEA 000	LEA 630	LEA 000	LEA 000
Kindergarten	34	0	0	30	0	0	30	0	0	30	0	0	30	0	0
Grade 01	34	0	0	30	0	0	30	0	0	30	0	0	30	0	0
Grade 02	22	0	0	30	0	0	30	0	0	30	0	0	30	0	0
Grade 03	0	0	0	20	0	0	25	0	0	30	0	0	30	0	0
Grade 04	0	0	0	0	0	0	25	0	0	25	0	0	30	0	0
Grade 05	0	0	0	0	0	0	0	0	0	25	0	0	25	0	0
Grade 06	0	0	0	0	0	0	0	0	0	0	0	0	25	0	0
	90			110			140			170			200		

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<b>Section IV: Governance and Capacity Concerns and Additional Questions</b>	<b>Reviewer</b>	<b>Page Reference</b>
N/A	Nicole Charles	Tax-Exempt S
Will the board members be able to meet often since there are two members from out of state?	Brian Smith	Governance a
Two members of the board currently reside out of state. Although one plans to return to Moore, she is related to another board member (the other member residing out of state). Will the members disclose their relationship and current residency publically? Who will monitor any conflicts of interest and real or perceived nepotism as the aforementioned members are Chair and Vice-Chair of the board?	Nicole Charles	Governance a
How will the board be evaluated and how is success defined in terms of governance?		
Applicant needs to clarify: How will the board members that live out of state contribute to the meetings and the progress of the school?	Kristen Parker	Governance a
An organizational chart is attached but lacks great detail. Two of the proposed board members live out of state, this should be discussed and ensure this falls within the NC charter school guidelines. A proposed board member and principal currently live out of state. This should be fully explored and discussed.	Greg Schermbeck	Governance a
N/A	Nicole Charles	Proposed Man
N/A	Greg Schermbeck	Proposed Man
Not applicable.	Douglas Price	Proposed Man
The applicant should be more specific regarding their recruiting plan for staff. Additional specifics regarding the recruitment and interview process would be helpful.	Greg Schermbeck	Staffing Pla
Applicant needs to clarify: What will the process for interviewing teaching candidates be? How will you ensure that teachers are aligned to the mission and vision of the proposed school?	Kristen Parker	Staffing Pla
Why is the Head of School's pay so low?	Brian Smith	Staffing Pla
What will happen if the one teacher assistant who has their CDL license is out sick or quits?		
How will the school respond to the "Teaching Fellow Pipeline" when that is depleted and officially ended shortly after this school opens?	Douglas Price	Staffing Pla
How will the applicant respond if not enough funding is raised to send teachers to the training? Will teachers be required to pay themselves?		
What will the ONGOING strategy be for recruiting and retaining high-performing teachers?		
Can this school afford to let a TA leave school during the day to drive on field trips? Will that not compromise ratios?		
Are the salaries high enough to attract the experienced teachers sought? Is the work load given the intense individualized curricula misaligned with the proposed salary scale?	Nicole Charles	Staffing Pla
Is the Head of School involved in the grievance or termination procedure? IS the assumption that "supervisor" reflects Head of School?		
Does the staffing adequately reflect: at-risk, ELL, EC student needs?		
The applicant should provide more information regarding how the proposed PD will relate to student achievement and be adjusted throughout the year based on academic data.	Greg Schermbeck	Staff Evalua
Applicant needs to clarify: What specific PD will be provided around the Montessori teaching approach? What needs to beginning teachers have when they first start teaching that will be addressed?	Kristen Parker	Staff Evalua
The marketing plan is detailed. Is the \$2500 proposed realistic?	Nicole Charles	Marketing Pl
very low marketing budget!	Joe Maimone	Marketing Pl

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Required for admission? The child will work individually with the Lead Teacher in his/her new environment, while the parent/guardian works with a MMCS staff person to complete school registration, including a confidential psychosocial screen. The screen will help MMCS determine food security and the stability and safety of the home. MMCS will encourage all incoming students to have a health assessment. In alignment with the school mission to support whole child development, MMCS will work to see that each student has a primary care medical home. Sandhills Pediatrics has agreed to provide health care assessments for our students, and has offered to provide a primary care medical home for any student needing one, regardless of the ability to pay.	Joe Maimone	Parent and C
Health assessment required?	Joe Maimone	Admissions P
What happens if the school receives less application than there are seats available? Will a lottery still culminate?	Douglas Price	Admissions P
Can you explain the reason for the specific admissions policy.  Why is there a waiting list for multiple birth if they are all admitted?  If the mission is to target diverse populations of low income students to close the gap, has the board considered the weighted lottery to include admittance of these students based on free/reduced lunch for their lottery process?	Brian Smith	Admissions P
The applicant should ensure that the school will be financially sustainable with the rather small student enrollment projections.	Greg Schermbeck	Projected St
Very low enrollment	Hilda Parlér	Projected St
Loe numbers a great challenge.	Joe Maimone	Projected St
Although the projections are realistic and manageable, how is the applicant ensuring financial sustainability given the small enrollment projections?	Nicole Charles	Projected St
n/a	Nicole Charles	Weighted Lot
Not applicable.	Douglas Price	Weighted Lot
N/A	Greg Schermbeck	Weighted Lot

Reviewer	Score
Alex Quigley	
Alan Hawkes	
Brian Smith	Pass
Cheryl Turner	
Steven Walker	
Deanna Townsend-Smith	
Eric Sanchez	Pass
Greg Schermbeck	Pass
Hilda Parlér	Pass
Joe Maimone	Pass
Glenn Allen	
Kristen Parker	Pass
Mike McLaughlin	
Douglas Price	Pass
Nicole Charles	Pass
Robert McOuat	

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**V. OPERATIONS**

**Transportation Plan:**

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

MMCS has budgeted \$17,800 to lease a new 66-passenger bus for five years, with a residual value of \$35,000 at the end of lease and the right to purchase at this price. The lease has a 5-year warranty. The budget allows for fuel for 7,000 miles of travel in Year One and \$800 in maintenance. Insurance for the bus is included in the insurance estimate. An Assistant with a CDL and school bus training will drive the bus in the morning and the afternoon.

MMCS's target population includes at-risk children in Aberdeen and Southern Pines, adjacent towns in Moore County. Bus route will serve central pick up locations in these neighborhoods. The bus will take children to the Boys & Girls Club after school for its aftercare program.

**School Lunch Plan:**

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

MMCS believes every child should have access to a nutritious meal at lunch. MMCS recognizes that for some children the school-provided lunch will be the most complete meal of the day. MMCS will locate a vendor in the community that can work within the National School Lunch Program requirements to provide lunch to qualifying children. We have designated \$10,000 in the budget to support costs that might not be met by NSLP funding.

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

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

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

Area of proposed coverage	Proposed amount of coverage	Cost (Quote)
Comprehensive General Liability	\$1,000,000	\$1,925.00
Officers and Directors/Errors and Omissions	\$1,000,000	\$1,200.00
Property Insurance	\$50,000	\$1,050.00



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Motor Vehicle Liability		\$1,000,000	\$980.00
Bonding Minimum/Maximum Amount	\$250,000	\$250,001	\$260.00
Other		\$600,000	\$2,720.00
Total Cost			\$8,135.00

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

**Health and Safety Requirements:**

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

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

ksrucker 09/17/2016

(Board Chair Signature) (Date)

**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.*

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

To best serve our targeted student population we will work to locate our school in the town of Aberdeen where no public Montessori options are available and there is opportunity gap for students at the neighborhood public schools. We are working with Holly Bell of Kuester Commercial Real Estate, a long time realtor and community leader with experience helping other small schools find suitable locations. We have reviewed comparable properties, including a 3,500 square foot space in the heart of downtown Aberdeen for \$12/square foot.

MMCS has won the unanimous support of Aberdeen's Mayor and the elected Town Council to find a temporary and/or permanent location in Aberdeen (Appendix O). The Town of Aberdeen is working strategically to revitalize its downtown business district. Several large buildings in the downtown Aberdeen area are set to be vacated in the coming year. The Aberdeen Planning Committee has already agreed to rezone land for a Conditional Use Permit for the school as needed and will provide support to obtain the Education Certificate of Occupancy.

*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.*

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Commercial real estate in Aberdeen is approximately \$8-12 per square foot. We have budgeted \$12 per square foot for a 6,000 square foot facility, in addition to the Self Help Credit Union recommended \$6 per square foot in operating expenses.

**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.

We have several contingency plans in progress if we and our partners, the Town Council of Aberdeen, are unable to secure a suitable location in the Aberdeen jurisdiction. Several churches in the area have large childhood education wings that are not in use during weekdays. These facilities have bathrooms, outdoor space, and meet ADA requirements.

We will continue conversations with leaders of these congregations to understand better the cost to rent these facilities. In addition, abundant rural land is for sale and lease just outside Aberdeen, on which we could place modular units for classrooms at \$400-800 a month per unit. MMCS would require use of 5 units in Year One and 6 units in Year Two. In pursuit of this option, we will work with the USDA Rural Development Department to determine MMCS eligibility for a rural development loan.

<b>Section V: Operations Concerns and Additional Questions</b>	<b>Reviewer</b>	<b>Page Reference</b>
The transportation plan does not provide a thorough explanation to ensure every child will have access to transportation. The projected budget also seems minimal for transportation. Both should be explained further.	Greg Schermbeck	Transportati
What is your plan for the provision of service is Transportation is identified as a necessary related service on a child IEP?	Glenn Allen	Transportati
Is one 66 passenger bus enough to transport 200 children to and from school given the target population? What is the contingency plan (if the bus breaks down for example)?	Nicole Charles	Transportati
Applicant needs to clarify: How will purchasing one 66 passenger bus ensure that all students are able get to and from the school?  Applicant needs to clarify: What are other methods of transportation that will be provided and or encouraged?	Kristen Parker	Transportati
The applicant should ensure that \$10,000 is enough of a contingency budget to ensure all students have access to quality meals.	Greg Schermbeck	School Lunch
Is the referenced \$10,000 contingency? If so, is the goal to have a reimbursement for meals? Where is this reflected?	Nicole Charles	School Lunch
Can the plan specified to address how all 200 students can be covered daily?		
Applicant needs to clarify: Will \$10,000 be enough to ensure that all students will have access to a meal? What is the rationale for \$10,000?	Kristen Parker	School Lunch
The amount quoted in the budget (\$7500) is less than the insurance quote in Appendix L	Nicole Charles	Civil Liabil
Why is there a difference between totals in the Appendix L and in the application?	Brian Smith	Civil Liabil
MMCS has won the unanimous support of Aberdeen's Mayor and the elected Town Council to find a temporary and/or permanent location in Aberdeen (Appendix O). The Town of Aberdeen is working strategically to revitalize its downtown business district. Several large buildings in the downtown Aberdeen area are set to be vacated in the coming year. The Aberdeen Planning Committee has already agreed to rezone land for a Conditional Use Permit for the school as needed and will provide support to obtain	Joe Maimone	Facility and

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the Education Certificate of Occupancy		
The applicant should provide more information regarding the facility and related contingency plan.	Greg Schermbeck	Facility and

<b>Reviewer</b>	<b>Score</b>
Alex Quigley	
Alan Hawkes	
Robert McOuat	
Nicole Charles	Pass
Douglas Price	Pass
Mike McLaughlin	
Kristen Parker	Pass
Glenn Allen	
Joe Maimone	Pass
Hilda Parlér	Pass
Greg Schermbeck	Fail
Eric Sanchez	Pass
Deanna Townsend-Smith	
Steven Walker	
Cheryl Turner	
Brian Smith	Fail

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## VI. FINANCIAL PLAN

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

### **Budget: Revenue Projections from each LEA 2018-19**

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

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

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

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

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

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

**REFER TO RESOURCE GUIDE FOR ADDITIONAL INFORMATION AND SOURCE DOCUMENTS**

LEA #1630 - Moore County Schools

Revenue	2016-2017 Per Pupil Funding	Projected LEA ADM	Approximate funding for 2018-2019
State Funds	\$5,015.53	90	\$451,397.70
Local Funds	\$1,967.00	90	\$177,030.00
Federal EC Funds	\$3,579.70	12	\$42,956.40
<b>Totals</b>			\$671,384.10

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

<b>INCOME: REVENUE PROJECTIONS</b>	<b>2018-2019</b>	<b>2019-2020</b>	<b>2020-2021</b>	<b>2021-2022</b>	<b>2022-2023</b>
<b>-State ADM Funds</b>	\$451,398	\$516,117	\$656,876	\$797,636	\$938,395
<b>-Local Per Pupil Funds</b>	\$177,030	\$216,370	\$275,380	\$334,390	\$393,400
<b>-Exceptional Children &amp; Federal Funds</b>	\$42,956	\$52,750	\$64,440	\$78,760	\$93,000
<b>-Other Funds*</b>	\$50,670	\$50,670	\$50,670	\$50,670	\$50,670
<b>-Working Capital*</b>	\$0	\$0	\$0	\$0	\$0
<b>Z - TOTAL REVENUE</b>	\$722,054	\$835,907	\$1,047,366	\$1,261,456	\$1,475,465

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

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

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

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

BUDGET EXPENDITURE PROJECTIONS Personnel	2018-2019			2019-2020			2020-2021			2021-2022			2022-2023		
	Num Staff	Avg Salary	Total salary	FTE	Avg Salary	Total salary	FTE	Avg Salary	Total salary	FTE	Avg Salary	Total salary	FTE	Avg Salary	Total salary
Administrative & Support Personnel:															
Lead Administrator	1	\$55,000	\$55,000	1	\$56,000	\$56,000	1	\$57,000	\$57,000	1	\$58,000	\$58,000	1	\$59,000	\$59,000
Assistant Administrator	0	\$0	\$0	0	\$0	\$0	1	\$55,000	\$55,000	1	\$56,000	\$56,000	1	\$57,000	\$57,000
Clerical	1	\$30,000	\$30,000	1	\$31,000	\$31,000	1	\$32,000	\$32,000	1	\$33,000	\$33,000	1	\$34,000	\$34,000
A - Total Admin and Support:	2		\$85,000	2		\$87,000	3		\$144,000	3		\$147,000	3		\$150,000
Instructional Personnel:															
Core Content Teacher(s)	4	\$40,000	\$160,000	5	\$41,000	\$205,000	6	\$42,820	\$256,920	7	\$43,600	\$305,200	8	\$44,470	\$355,760
Exceptional Children Teacher(s)	.5	\$40,000	\$20,000	1	\$41,000	\$41,000	1	\$42,820	\$42,820	1	\$43,600	\$43,600	1	\$44,470	\$44,470
Instructional Support	.5	\$40,000	\$20,000	.5	\$40,000	\$20,000	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Teacher Assistants	4	\$23,000	\$92,000	4	\$25,000	\$100,000	5	\$26,500	\$132,500	7	\$27,000	\$189,000	8	\$27,600	\$220,800
B - Total Instructional Personnel:	9		\$292,000	10.5		\$366,000	12		\$432,240	15		\$537,800	17		\$621,030
A+B = C - Total Admin, Support and Instructional Personnel:	11		\$377,000	12.5		\$453,000	15		\$576,240	18		\$684,800	20		\$771,030
Administrative & Support Benefits															
Health Insurance	2	\$5,000	\$10,000	2	\$5,000	\$10,000	3	\$5,500	\$16,500	3	\$6,000	\$18,000	3	\$6,000	\$18,000

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Retirement Plan--Other	2	\$2,550	\$5,100	2	\$2,580	\$5,160	3	\$2,840	\$8,520	3	\$2,940	\$8,820	3	\$3,000	\$9,000
Medicare	2	\$595	\$1,190	2	\$623	\$1,246	3	\$686	\$2,058	3	\$710	\$2,130	3	\$2,140	\$6,420
Social Security	2	\$2,635	\$5,270	2	\$2,666	\$5,332	3	\$2,934	\$8,802	3	\$3,040	\$9,120	3	\$3,030	\$9,090
D - Total Admin and Support Benefits:	8		\$21,560	8		\$21,738	12		\$35,880	12		\$38,070	12		\$42,510
Instructional Personnel Benefits:															
Health Insurance	4	\$5,000	\$20,000	6	\$5,000	\$30,000	7	\$5,000	\$35,000	8	\$6,000	\$48,000	9	\$6,000	\$54,000
Retirement Plan--Other	4	\$2,400	\$9,600	6	\$2,460	\$14,760	7	\$2,570	\$17,990	8	\$2,620	\$20,960	9	\$2,700	\$24,300
Social Security	9	\$2,011	\$18,099	10.5	\$2,155	\$22,628	12	\$2,233	\$26,796	15	\$1,780	\$26,700	17	\$2,235	\$37,995
Medicare	9	\$470	\$4,230	10.5	\$481	\$5,051	12	\$522	\$6,264	15	\$417	\$6,255	17	\$529	\$8,993
Retention Bonus	0	\$0	\$0	4	\$3,000	\$12,000	5	\$3,000	\$15,000	6	\$3,000	\$18,000	7	\$3,000	\$21,000
E - Total Instructional Personnel Benefits:	26		\$51,929	37		\$84,438	43		\$101,050	52		\$119,915	59		\$146,288
D+E = F - Total Personnel Benefits	34		\$73,489	45		\$106,176	55		\$136,930	64		\$157,985	71		\$188,798
A+D = G - Total Admin and Support Personnel (Salary & Benefits)	10		\$106,560	10		\$108,738	15		\$179,880	15		\$185,070	15		\$192,510
B+E = H - Total Instructional Personnel (Salary & Benefits)	35		\$343,929	47.5		\$450,438	55		\$533,290	67		\$657,715	76		\$767,318
G+H = J - TOTAL PERSONNEL	45		\$450,489	57.5		\$559,176	70		\$713,170	82		\$842,785	91		\$959,828

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

<b>BUDGET OPERATIONS EXPENDITURE PROJECTIONS</b>		<b>2018-2019</b>	<b>2019-2020</b>	<b>2020-2021</b>	<b>2021-2022</b>	<b>2022-2023</b>
	Administrative & Support:					
Office:	Office Supplies	\$3,000	\$3,000	\$3,000	\$4,000	\$5,000
	Computers & Software	\$2,200	\$1,500	\$1,500	\$1,500	\$5,000
	Communications & Telephone	\$2,000	\$2,000	\$2,000	\$3,000	\$4,000
Professional Contract	Legal Counsel	\$2,500	\$2,500	\$2,500	\$3,000	\$5,000
	Financial	\$15,000	\$15,000	\$15,000	\$15,000	\$20,000
Facilities	Facility Lease/Mortgage	\$72,000	\$75,000	\$80,000	\$125,000	\$125,000
	Insurance (pg19)	\$7,500	\$7,500	\$7,500	\$13,000	\$13,000
Transportation	Buses	\$15,000	\$15,000	\$15,000	\$25,000	\$25,000
	Gas	\$2,000	\$2,000	\$2,500	\$3,500	\$4,000
	Oil/Tires & Maintenance	\$800	\$1,000	\$1,000	\$2,000	\$2,500
Other	Marketing	\$2,500	\$1,000	\$1,000	\$1,000	\$1,000
	Child nutrition	\$10,000	\$10,000	\$15,000	\$20,000	\$20,000
	Travel	\$1,500	\$1,500	\$2,000	\$2,500	\$4,000
	Contingency Fund	\$34,750	\$41,700	\$52,300	\$63,000	\$73,000
Facilities	Operating Expenses	\$36,000	\$36,000	\$40,000	\$62,000	\$62,000
	K - TOTAL Administrative & Support Operations	\$206,750	\$214,700	\$240,300	\$343,500	\$368,500
	Instructional:					
Classroom Technology	Computers	\$2,000	\$1,500	\$2,000	\$4,000	\$4,000
	Instructional Technology	\$1,800	\$2,000	\$2,200	\$2,400	\$2,600
Books and Supplies	Instructional Materials	\$35,000	\$15,000	\$15,000	\$15,000	\$30,000
	Curriculum/Texts	\$5,000	\$2,500	\$2,500	\$5,000	\$5,000
	Testing Supplies	\$4,000	\$3,000	\$3,000	\$3,000	\$3,000
Instructional Contract	Ec Instructional Support	\$10,000	\$12,000	\$14,000	\$16,000	\$20,000
	L - TOTAL Instructional Operations	\$57,800	\$36,000	\$38,700	\$45,400	\$64,600
	K+L = M - TOTAL OPERATIONS	\$264,550	\$250,700	\$279,000	\$388,900	\$433,100



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**Overall Budget:**

<b>BUDGET OPERATIONS EXPENDITURE PROJECTIONS</b>	<b>2018-2019</b>	<b>2019-2020</b>	<b>2020-2021</b>	<b>2021-2022</b>	<b>2022-2023</b>
J - TOTAL PERSONNEL	\$450,489	\$559,176	\$713,170	\$842,785	\$959,828
M - TOTAL OPERATIONS	\$264,550	\$250,700	\$279,000	\$388,900	\$433,100
J+ M =N TOTAL EXPENDITURES	\$715,039	\$809,876	\$992,170	\$1,231,685	\$1,392,928
Z - TOTAL REVENUE	\$722,054	\$835,907	\$1,047,366	\$1,261,456	\$1,475,465
Z - N = SURPLUS / (DEFICIT)	\$7,015	\$26,031	\$55,196	\$29,771	\$82,537

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

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

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

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

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

The Montessori teaching method is most effective when children are introduced to the style at a young age. Initially, MMCS will serve 90 students in four classrooms. Our 34 Kindergartners will learn in two Primary classrooms, and 56 1st and 2nd graders will learn in two Lower Elementary classrooms. The 5% contingency fund and budget surplus allows for a break-even point of 84 students. In its second year of operation, MMCS will add an additional Lower Elementary classroom to support the group of Kindergartners moving up to 1st grade. MMCS will add a grade each year up to 6th grade by 2022.

Through outreach to families at preschool open houses and Boys and Girls Club meetings, MMCS found a strong demand for more high-quality school options. Families reported wanting deeper learning experiences and more hand-on materials for children. Families currently enrolled at the local Montessori preschool are highly motivated to see their children continue learning in Montessori classrooms (Appendix A).

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

In its first year of operation, MMCS's contingency fund is \$32,000 or 5% of the budget, per Self Help recommended guidelines. These funds can be used if anticipated revenues are not received or are lower than estimated.

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

MMCS will partner with our local Montessori preschool, The Garden Montessori Arts and Learning Center to build a mixed-age Primary learning community for our Kindergarten students. Twenty children ages 3 and 4 will learn in the Primary classrooms for the morning work period from 8:30 am to 12:00 pm, five days a week. These children will pay privately via The Garden Montessori for 14 hours of instruction a week. The Garden Montessori will pay MMCS at a monthly rate of \$5,067.90 for 10 months. This payment to MMCS

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will cover the use of its Lead Teacher, Assistant Teacher, materials, and facility (Appendix O). Garden Montessori will manage independently enrollment, record keeping, marketing, liability, and other administrative tasks related to its 20 preschool students. We are confident that there is demand for high-quality Montessori preschool: Moore County has a shortage of preschools, many of which have extensive waiting lists, including Garden Montessori with its waitlist exceeding 50 children as of June 2016. Children enrolled in the private preschool program are not guaranteed a spot in the public charter Kindergarten cohort; they will be required to enroll and participate in the lottery.

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

1:14 student : teacher (Lead & Assistant)

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

MMCS will contract for services to support (1) professional development through workshops; (2) therapeutic services for exceptional children as prescribed by their individual IEPs; (3) custodial work; (4) payroll; and (5) auditing. The Head of School or other members of the Board of Directors will solicit at least three bids through a Request for Proposal (RFP) process for provision of contract services. The RFP will include submission of client references, accreditation, insurances, and costs for services. Bids will then be submitted to and approved by the Board of Directors (See Bylaws Article XI. Section 2. Bid Process). To prevent conflict of interest issues and to provide sufficient checks and balances, accounting and auditing services will be provided by separate firms.

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

MMCS developed its budget to position the school to achieve its mission: to provide an excellent, equitable Montessori education to students of diverse backgrounds in Moore County. MMCS's first year budget follows the formulas from Self-Help's Sound Financial Health Metrics for charter school budgeting. We are prioritizing the following, as reflected in our budgetary allotments: 60% on human capital, which includes high-quality, well-compensated Montessori teachers, Head of School, and crucial support staff; and 40% on creating the ideal Montessori learning environment for our students, which includes facility and maintenance, materials, and technology.

We have a 5% contingency fund, as a signal that the Board and Head of School are committed to sound fiscal health of school.

The facilities and fixed operating costs are \$108,000 and 15% of total budget. This allows for 6,000 square feet at \$12 a square foot, and \$6 a square foot for operating expenses including: utilities, repair, maintenance, cleaning, and security.

MMCS will provide transportation and school lunch in order to best serve our targeted population.

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In addition to funding from National School Lunch Program (NSLP), MMCS will budget \$10,000 for school lunch support to cover costs billed by food vendor not covered by NSLP funding.

MMCS will budget \$17,800 to lease a 66-passenger bus based on estimates from Carolina Thomas Rentals, fuel costs for 7,000 miles, and annual maintenance. The bus is insured in the insurance coverage estimate. An Assistant Teacher with a CDL will drive the bus at their hourly pay rate.

MMCS will budget for computers for the administration and classrooms, including 2 Lower Elementary classroom chromebooks (\$250 each), 2 administration chromebooks (\$250) and 9 tablets (\$200 each).

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

*Describe how the school will develop the fund balance.*

MMCS plans to build a general fund balance of three months annual operating expenses by year 2022. MMCS will contribute at least 5% total revenue annually to increase the general fund balance over time after Year One.

MMCS plans to apply for state, federal and private grants, as well as engage in other fundraising activities to supplement our educational programs. We intend to raise an additional 25% in total funds above the state and local allotments by the end of the first academic year. These supplemental funds are not included in the budget assumptions for this application.

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

MMCS is working with a commercial real estate agent with experience in securing school buildings in order to lease a building for the first several years of operation in downtown Aberdeen. The cost to upfit the building will be amortized over the several year lease and offset by the tax benefit afforded the landlord for real estate property wholly and exclusively used for educational purposes.

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

MMCS will not have assets from other sources.

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

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

In compliance with General Statute 115C-238.29B (b)(6) and 115C-238.29F (f), the MMCS Board of Directors will establish policies and procedures for financial and program audits to ensure compliance with the following: (1) the financial audits, the audit procedures, and the audit requirements adopted by the State Board of Education for charter schools. These audit requirements may include the requirements of the School Budget and Fiscal Control Act; and (2) reporting requirements established by the State Board of Education in the Uniform Education Reporting System.

The Board of Directors will establish two committees to oversee MMCS's financial and control infrastructure: Audit Committee and Finance Committee.

The Audit Committee will oversee the audit work and perform the following functions:

- \*Solicit audit services through Request for Proposal process.
- \*Obtain Board of Director approval and appoint auditors.
- \*Establish audit fees.
- \*Approve audit plan.
- \*Review all material and written communication between external auditors and MMCS.
- \*Review with Board of Directors and management annual financial statements and audit results.
- \*Evaluate performance of external auditors on an annual basis.
- \*Review and obtain approval of Board of Directors on Return of Organization Exempt From Income Tax (Form 990).

MMCS budget includes costs for an independent, external auditor to conduct annual audit in accordance with generally accepted auditing standards and Government Auditing Standards issued by the Comptroller General of the United States. The Head of School, Office Manager, and Treasurer will keep up-to-date, comprehensive and accurate records to support internal controls and meet the annual external audit requirements.

The Finance Committee shall consist of non-employee board members who have appropriate expertise and independence. Members of the Finance Committee will include but are not limited to the Chairperson and Treasurer. The responsibility of the Finance Committee is to:

- \*Work with the Head of School to prepare a detailed annual budget that aligns hiring and other variable expenses with a conservative projection of student enrollment.
- \*Develop strategic financial plans to ensure financial viability and future success of MMCS.
- \*Develop a financial feedback loop for monitoring revenue and expenses, timing of cash flow, and balances in accounts.
- \*Monitor leading indicators on a regular basis, including but not limited to marketing and student enrollment.
- \*Monitor General Fund Balance and ensure MMCS meets its annual contribution goals.
- \*Obtain and monitor a contingency funding line of credit with a local

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financial institution.

\*Monitor compliance for all reporting requirements.

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

MMCS does not have any known nor does it anticipate any possible related party transactions.

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

Petway, Mills & Pearson, CPA, PA: Zebulon, NC

Rives & Associates, LLP: Raleigh, NC

Thomas, Judy & Tucker, PA: Raleigh, NC

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<b>Section VI: Financial Plan Concerns and Additional Questions</b>	<b>Reviewer</b>	<b>Page Reference</b>
Explain other funds. Why no App M?	Joe Maimone	Budget Reven
The enrollment aligns but concerns about sustainability (as mentioned in other sections) remain.	Nicole Charles	Budget Reven
The enrollment projection aligns with Section I yet does not appear sustainable for a first year school.	Greg Schermbeck	Budget Reven
Attach Appendix "M". Other Funds?	Hilda Parlér	Budget Reven
Low numbers a great budget challenge	Joe Maimone	Total Budget
Appendix M is not attached. Thus, it is difficult to determine if the provided budget is a realistic outline.	Greg Schermbeck	Total Budget
What are "the other funds"?	Douglas Price	Total Budget
The revenue is fully explained, however, is the budget realistic given the population? An increase in required EC could easily absorb the fund balance (need a full-time EC teacher etc.)	Nicole Charles	Total Budget
\$55,000 is a rather low salary for a school leader.	Greg Schermbeck	Personnel Bu
Is there a contingency plan for Exceptional Children if a child enrolls that requires a Separate Setting since only a half time EC Teacher is budgeted?	Glenn Allen	Personnel Bu
How will you attract and retain the administration with a low salary? How will the EC Coordinator be able to do all of the work with a half time position? It appears that the EC Coordinator will be well paid the first year but the same as a regular teacher in the coming years. How will you retain the EC Coordinator? How will the one Teacher Assistant that is CDL licensed be compensated compared to the other Teacher Assistants who do not have this extra duty?	Brian Smith	Personnel Bu
Aforementioned concerns about pay scale remain: -is \$55,000 Head of School salary realistic given the work load -can teachers with more than three years experience, as proposed, be recruited at \$40-47,000? -what happens to the budget if increased EC services are required?	Nicole Charles	Personnel Bu
Applicant needs to clarify: Outlined in the application is the use of beautiful independent work boards- is this materials and creation of these resources budgeted in the Instructional Materials Section?	Kristen Parker	Operations B
Have funds been budgeted for the provision of related services such as OT, PT, Speech, Psychological Services etc., as may be outlined in an child's IEP?	Glenn Allen	Operations B
skeleton budget expenditures due to low numbers. Explain contingency	Joe Maimone	Operations B
Operations budget is very low. (Admin. and support, Instructional)	Hilda Parlér	Operations B
Across the board, are the supply projections realistic? - where is the bus contingency fund? - how can such a small office budget support the resource heavy curriculum? -how can the detailed marketing plan be actualized with \$2500?	Nicole Charles	Operations B
How can the difference in insurance budget projections and insurance quote be explained?		
How will technology goals be addressed with the small amount of funds?	Brian Smith	Operations B
There are a number of budget items that present concerns. \$10,000 for all nutritional needs is low. \$72,000 for the facility lease / mortgage is low. \$0 is budgeted for copy paper. \$5,000 for curriculum / texts is low.	Greg Schermbeck	Operations B
Explain contingency use	Joe Maimone	Total Expend

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Explain other revenue		
Can the low fund balance in year one sustain any unforeseen circumstances?	Nicole Charles	Total Expend
The surplus is incredibly low for the first 4 years of operation. A deeper analysis of the budget should take place.	Greg Schermbeck	Total Expend
The applicant does not provide a detailed description or evidence of demand for this school. Appendix M is not attached and thus the financial contingency plan is difficult to assess. Given the previously listed budget concerns, it is difficult to determine the financial viability of this plan.	Greg Schermbeck	Budget Narra
Can the applicant provide more detail on contingency plans?	Nicole Charles	Budget Narra
The budget is not realistic for financial viability given the mission and educational plan.		
Elaborate on partnership with pre-school program. Why will they pay MMCS if they are already operating?	Joe Maimone	Budget Narra

Reviewer	Score
Alex Quigley	
Robert McOuat	
Douglas Price	Pass
Mike McLaughlin	
Kristen Parker	Pass
Glenn Allen	
Joe Maimone	Pass
Hilda Parlér	Pass
Greg Schermbeck	Fail
Eric Sanchez	Pass
Deanna Townsend-Smith	
Steven Walker	
Cheryl Turner	
Brian Smith	Pass
Alan Hawkes	
Nicole Charles	Fail

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**VII AGREEMENT PAGE**

**Application Fee:**

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

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

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

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

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

ksrucker Date: 09/18/2016

**Applicant Signature:**

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

Print/Type Name: ksrucker

Board Position: Katherine Rucker, Founder

Signature: \_\_\_\_\_

Date: 09/18/2016

Sworn to and subscribed before me this  
\_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

\_\_\_\_\_  
Notary Public

\_\_\_\_\_  
Official Seal



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My commission expires: \_\_\_\_\_, 20\_\_\_\_\_.

## OVERALL ASSESSMENT

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

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

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

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

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

<b><u>CSAB Votes</u></b>	
<b>No</b>	<b>Yes</b>
0	11

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

### Initial Screening

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<b>Mission, Purposes, and Goals</b>	- haparler
<b>Education Plan</b>	- haparler
<b>Governance and Capacity</b>	(1) Applicant has 24 months after approval to obtain tax exempt status - esanchez
<b>Operations</b>	Check insurance budget numbers - esanchez
<b>Financial Plan</b>	Applicant identified "Other Funds" and did not provide Appendix M - esanchez
<b>OVERALL</b>	- dtsmith840  - haparler  Appendix M needed? - joseph_maimone

### External Evaluator

<b>Mission, Purposes, and Goals</b>	<p><u>Mission Statement</u> Do these percentages align with the US Census? - brian_smith2</p> <p><u>Mission Statement</u> No mention of Montessori in mission? - joseph_maimone</p> <p><u>Educational Need and Targeted Student Population</u> The applicant provides quality data to support demand and academic need for this school. The applicant should provide additional information regarding the projected student enrollment and how it will plan to stay financially sustainable. - gscherbeck</p> <p><u>Educational Need and Targeted Student Population</u> Attached for review purposes is a map outlining the current charter schools. Additionally, the map provides an overview of the general placement of proposed charter schools for the 2018 school year: <a href="http://www.dpi.state.nc.us/charterschools/schools/map">http://www.dpi.state.nc.us/charterschools/schools/map</a>. - dtsmith840</p> <p><u>Purposes of Proposed Charter School</u> The applicant should provide clear data points and measurable student outcomes for each purpose. The related documentation is helpful but provides broad strokes and is not incredibly specific. - gscherbeck</p> <p><u>Purposes of Proposed Charter School</u> Although the purposes are meaningful and manageable, how specifically are student outcomes monitored given the no test model of the Montessori model - nacharles</p> <p><u>Purposes of Proposed Charter School</u> Montessori focus is a defining purpose - joseph_maimone</p> <p><u>Goals for the Proposed Charter School</u> The applicant provides clear and measurable goals but does not explicitly connect these</p>
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	<p>goals to how to the governing board. - gscherbeck</p> <p><u>Goals for the Proposed Charter School</u> Applicant needs to clarify: For students who are behind grade level what does advance more than one grade level in reading each year mean? Is it 1.5 grade levels? At least 2 grade levels?  - kzparker718</p> <p><u>Goals for the Proposed Charter School</u> What is the contingency plan for students that fall behind the school's goals? Are your goals similar to the district in your area?  How will the board ensure they are not involved in the day to day operation? - brian_smith2</p> <p><u>Goals for the Proposed Charter School</u> Is it realistic to attain students who reach at least one full grade level ahead in reading? Is there justification that this is truly attainable? - mycah068</p> <p><u>Goals for the Proposed Charter School</u> Are the gains required in the goals catered to each student?  What does "more than one grade-level" mean in terms of gains?  What is the plan for students unable to make gains in the time frame proposed? - nacharles</p> <p><u>Goals for the Proposed Charter School</u> Measure of Success: We will use the Minnesota Executive Function Scale (MEFS), a five-minute assessment to pre-screen each child's EF skills at the beginning of the year. We will also use MEFS to track students' growth throughout the year, and for an end of year assessment. Results will be presented quarterly to the staff and Board. - joseph_maimone</p>
<p><b>Education Plan</b></p>	<p><u>Instructional Program</u> The applicant should provide additional information regarding the proposed assessment strategies and their relation to the instructional curriculum. - gscherbeck</p> <p><u>Instructional Program</u> Applicant needs to clarify: What specific assessment strategies will be used to support instructional progress for students? - kzparker718</p> <p><u>Instructional Program</u> Where is the documented evidence to support the proposed approach and how it provides improved student performance? - mycah068</p> <p><u>Instructional Program</u> Although the applicant beautifully describes the approach, can data and resources about how the model works for at-risk and EC students? - nacharles</p> <p><u>Instructional Program</u> Excellent: Multi-aged Classrooms: The Montessori learning environment is structured somewhat differently from traditional schools. For example, 3, 4, and 5 year olds will learn together</p>

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in the Primary classroom. Elementary students are grouped into Lower Elementary (ages 6,7,8) and Upper Elementary (9,10,11). Typical class size is 25 to 30 students, with a Lead Teacher and Assistant Teacher. The benefits of multi-age groupings are many: teachers work with the same students over a 3-year cycle, thus becoming very familiar with the child. Younger children have the benefit of observing the work of older students, while older children get to serve as role models and teachers, another outlet to practice and consolidate their own knowledge. Also, children do not feel a sense of being behind others as everyone is working at their own, personalized level. - joseph\_maimone

Curriculum and Instructional Design

Appendix B is attached and provides a great amount of detail regarding the instructional program.

The applicant should include additional detail regarding how their instructional program will ensure success for a wide range of learners.

- gschermbek

Curriculum and Instructional Design

While there is a lot of "data" about multi-grouping thrown about in this application, where is the citation for support and statistics that agree with the statements made?

Further, can the applicant please provide explicit data on how having large groupings of 25-30 per class is:

- innovative for education
- enhances student learning for the better
- enhances teaching quality - mycah068

Curriculum and Instructional Design

Given the grouping of students by age rather than grade, how can the plan be translated to allow the board, the state, and laymen to assess the quality of education and student outcomes? - nacharles

Curriculum and Instructional Design

Is there documentation of successful M programs in NC or US? - joseph\_maimone

Special Programs and "At-Risk" Students

NC now uses a Multi-Tiered System of Support. Since the school proposed to follow "NC Responsiveness to Instruction," how does the proposed model align to the NC approved system of support? What adjustments will the school make or will the RTI model continue to be used? - brian\_smith2

Exceptional Children – Identification and Records

What is your process for when a parent requests an evaluation or Special Education Services? - kevin\_allen

Exceptional Children – Identification and Records

Can families request evaluations or are they solely school staff driven?

Although the general pieces are in place to serve exceptional students well, can the applicant review the IEP team requirements and the 90 day rule which begins at the point of request? - nacharles

Exceptional Children – Education Programming

The applicant should provide additional information regarding how data will be leveraged

<p>within the individualized plans to ensure student success. - gscherbeck</p> <p><u>Exceptional Children – Education Programming</u> Applicant needs to clarify: What specific data will be used to monitor student progress on IEPs? - kzparker718</p> <p><u>Exceptional Children – Education Programming</u> There may be some confusion on the 90 day time line. The timeline begins the day the referral is made or the day a parent puts the request in writing. The eligibility meeting and determination is to be made within the 90 days. - kevin_allen</p> <p><u>Exceptional Children – Education Programming</u> Does MMCS have an assessment for students with I.E.P to ensure the goals are met? - nacharles</p> <p><u>Student Performance Standards</u> The applicant should explain the additional assessments and models will be used to ensure student success. - gscherbeck</p> <p><u>Student Performance Standards</u> Applicant needs to clarify: What specific data sources will be used to monitor student progress?</p> <p>Applicant needs to clarify: Will students be given grades? How will these grades be determined to ensure all students are on track to meet the goals outlined? - kzparker718</p> <p><u>Student Performance Standards</u> How will student's grade levels transferring in or out be determined to ensure consistency? - brian_smith2</p> <p><u>Student Performance Standards</u> It is mentioned that there are additional considerations for students with disabilities but no clear method or plan is provided as it related to promotion and retention. What is your plan? - kevin_allen</p> <p><u>Student Performance Standards</u> How are the performance standards adjust for at-risk or exceptional students?</p> <p>Can the applicant specify how data is used to adjust students plans especially for at-risk or exceptional students? - nacharles</p> <p><u>Student Performance Standards</u> Can the applicant please address what math assessment tool will be used?</p> <p>Can the applicant speak more on what "tracking" for Executive Function Skills looks like? - mycah068</p> <p><u>Student Conduct and Discipline</u> The applicant should provide more detail regarding the student conduct and discipline policy. The applicant should clearly state how this policy will differentiate at different grade levels and positive incentives that will be used to ensure proper behavior. - gscherbeck</p> <p><u>Student Conduct and Discipline</u></p>
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	<p>Applicant needs to clarify: A few strategies are listed for student behaviors but are there specific structures that students will be asked to follow? How will students be monitored during the 3 our independent work time? - kzparker718</p> <p><u>Student Conduct and Discipline</u>          Why would the Head of School consult with the Board of Directors about a suspension? In the event that a child with special needs exhibits behavior which, if the child were not a child with special needs, could result in the suspension of the child from school for a period of more than ten school days or for consecutive periods that total more than ten school days, the school shall require a multidisciplinary team promptly to review the evaluation already completed for the child and conduct any additional evaluations necessary to determine if the behavior is caused by the child's special needs, including if the child is receiving appropriate education presently or whether medication is needed or current medication needs adjustment. (Adapted from Island Montessori Student Handbook)Did the parents give consent? - brian_smith2</p> <p><u>Student Conduct and Discipline</u>          The application mentions the need for medication or medication adjustment. Please refer to the prohibition on mandatory medication NC 1501-15.5 or pages 50 and 51 of the Policies Governing Services for students with disabilities. How specifically will the school handle discipline for students with disabilities when there is a change of placement based on accumulation of 10 day suspensions or any suspension of 10 days or more. Again, please refer to the Policies Governing Services for Students with Disabiities. - kevin_allen</p> <p><u>Student Conduct and Discipline</u>          IS the section addressing discipline for special needs children designed to function as the manifestation determination? MMCS should ensure that their policy aligns with laws for special education students - nacharles</p> <p><u>Student Conduct and Discipline</u>          Multi-aged Classrooms: The Montessori learning environment is structured somewhat differently from traditional schools. For example, 3, 4, and 5 year olds will learn together in the Primary classroom. Elementary students are grouped into Lower Elementary (ages 6,7,8) and Upper Elementary (9,10,11). Typical class size is 25 to 30 students, with a Lead Teacher and Assistant Teacher. The benefits of multi-age groupings are many: teachers work with the same students over a 3-year cycle, thus becoming very familiar with the child. Younger children have the benefit of observing the work of older students, while older children get to serve as role models and teachers, another outlet to practice and consolidate their own knowledge. Also, children do not feel a sense of being behind others as everyone is working at their own, personalized level. - joseph_maimone</p>
<p><b>Governance and Capacity</b></p>	<p><u>Tax-Exempt Status 501 (c)(3)</u>          N/A - nacharles</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u>          An organizational chart is attached but lacks great detail.          Two of the proposed board members live out of state, this should be discussed and ensure this falls within the NC charter school guidelines.          A proposed board member and principal currently live out of state. This should be fully explored and discussed. - gscherbeck</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u>          Applicant needs to clarify: How will the board members that live out of state contribute to</p>

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	<p>the meetings and the progress of the school? - kzparker718</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> Will the board members be able to meet often since there are two members from out of state? - brian_smith2</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> Two members of the board currently reside out of state. Although one plans to return to Moore, she is related to another board member (the other member residing out of state). Will the members disclose their relationship and current residency publically? Who will monitor any conflicts of interest and real or perceived nepotism as the aforementioned members are Chair and Vice-Chair of the board?</p> <p>How will the board be evaluated and how is success defined in terms of governance? - nacharles</p> <p><u>Proposed Management Organization (EMO/CMO)</u> N/A - gscherbeck</p> <p><u>Proposed Management Organization (EMO/CMO)</u> Not applicable. - mycah068</p> <p><u>Proposed Management Organization (EMO/CMO)</u> N/A - nacharles</p> <p><u>Staffing Plans, Hiring, and Management</u> The applicant should be more specific regarding their recruiting plan for staff. Additional specifics regarding the recruitment and interview process would be helpful. - gscherbeck</p> <p><u>Staffing Plans, Hiring, and Management</u> Applicant needs to clarify: What will the process for interviewing teaching candidates be? How will you ensure that teachers are aligned to the mission and vision of the proposed school? - kzparker718</p> <p><u>Staffing Plans, Hiring, and Management</u> Why is the Head of School's pay so low?</p> <p>What will happen if the one teacher assistant who has their CDL license is out sick or quits? - brian_smith2</p> <p><u>Staffing Plans, Hiring, and Management</u> Are the salaries high enough to attract the experienced teachers sought? Is the work load given the intense individualized curricula misaligned with the proposed salary scale?</p> <p>Is the Head of School involved in the grievance or termination procedure? IS the assumption that "supervisor" reflects Head of School?</p> <p>Does the staffing adequately reflect: at-risk, ELL, EC student needs? - nacharles</p> <p><u>Staffing Plans, Hiring, and Management</u> How will the school respond to the "Teaching Fellow Pipeline" when that is depleted and officially ended shortly after this school opens?</p>
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<p>How will the applicant respond if not enough funding is raised to send teachers to the training? Will teachers be required to pay themselves?</p> <p>What will the ONGOING strategy be for recruiting and retaining high-performing teachers?</p> <p>Can this school afford to let a TA leave school during the day to drive on field trips? Will that not compromise ratios? - mycah068</p> <p><u>Staff Evaluation and Professional Development</u> The applicant should provide more information regarding how the proposed PD will relate to student achievement and be adjusted throughout the year based on academic data. - gschermbek</p> <p><u>Staff Evaluation and Professional Development</u> Applicant needs to clarify: What specific PD will be provided around the Montessori teaching approach? What needs to beginning teachers have when they first start teaching that will be addressed? - kzparker718</p> <p><u>Marketing Plan</u> The marketing plan is detailed. Is the \$2500 proposed realistic? - nacharles</p> <p><u>Marketing Plan</u> very low marketing budget! - joseph_maimone</p> <p><u>Parent and Community Involvement</u> Required for admission? The child will work individually with the Lead Teacher in his/her new environment, while the parent/guardian works with a MMCS staff person to complete school registration, including a confidential psychosocial screen. The screen will help MMCS determine food security and the stability and safety of the home. MMCS will encourage all incoming students to have a health assessment. In alignment with the school mission to support whole child development, MMCS will work to see that each student has a primary care medical home. Sandhills Pediatrics has agreed to provide health care assessments for our students, and has offered to provide a primary care medical home for any student needing one, regardless of the ability to pay. - joseph_maimone</p> <p><u>Admissions Policy</u> Can you explain the reason for the specific admissions policy.  Why is there a waiting list for multiple birth if they are all admitted?  If the mission is to target diverse populations of low income students to close the gap, has the board considered the weighted lottery to include admittance of these students based on free/reduced lunch for their lottery process? - brian_smith2</p> <p><u>Admissions Policy</u> What happens if the school receives less application than there are seats available? Will a lottery still culminate? - mycah068</p> <p><u>Admissions Policy</u> Health assessment required? - joseph_maimone</p> <p><u>Projected Student Enrollment (Table)</u></p>
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	<p>The applicant should ensure that the school will be financially sustainable with the rather small student enrollment projections. - gscherbeck</p> <p><u>Projected Student Enrollment (Table)</u> Although the projections are realistic and manageable, how is the applicant ensuring financial sustainability given the small enrollment projections? - nacharles</p> <p><u>Projected Student Enrollment (Table)</u> Loe numbers a great challenge. - joseph_maimone</p> <p><u>Projected Student Enrollment (Table)</u> Very low enrollment - haparler</p> <p><u>Weighted Lottery</u> N/A - gscherbeck</p> <p><u>Weighted Lottery</u> n/a - nacharles</p> <p><u>Weighted Lottery</u> Not applicable. - mycah068</p>
<p><b>Operations</b></p>	<p><u>Transportation Plan</u> The transportation plan does not provide a thorough explanation to ensure every child will have access to transportation. The projected budget also seems minimal for transportation. Both should be explained further. - gscherbeck</p> <p><u>Transportation Plan</u> Applicant needs to clarify: How will purchasing one 66 passenger bus ensure that all students are able get to and from the school?</p> <p>Applicant needs to clarify: What are other methods of transportation that will be provided and or encouraged? - kzparker718</p> <p><u>Transportation Plan</u> What is your plan for the provision of service is Transportation is identified as a necessary related service on a child IEP? - kevin_allen</p> <p><u>Transportation Plan</u> Is one 66 passenger bus enough to transport 200 children to and from school given the target population? What is the contingency plan (if the bus breaks down for example)? - nacharles</p> <p><u>School Lunch Plan</u> The applicant should ensure that \$10,000 is enough of a contingency budget to ensure all students have access to quality meals. - gscherbeck</p> <p><u>School Lunch Plan</u> Applicant needs to clarify: Will \$10,000 be enough to ensure that all students will have access to a meal? What is the rationale for \$10,000? - kzparker718</p> <p><u>School Lunch Plan</u> Is the referenced \$10,000 contingency? If so, is the goal to have a reimbursement for meals? Where is this reflected?</p>

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	<p>Can the plan specified to address how all 200 students can be covered daily? - nacharles</p> <p><u>Civil Liability and Insurance</u> Why is there a difference between totals in the Appendix L and in the application? - brian_smith2</p> <p><u>Civil Liability and Insurance</u> The amount quoted in the budget (\$7500) is less than the insurance quote in Appendix L - nacharles</p> <p><u>Facility and Facility Contingency Plan</u> The applicant should provide more information regarding the facility and related contingency plan. - gscherbeck</p> <p><u>Facility and Facility Contingency Plan</u> MMCS has won the unanimous support of Aberdeen's Mayor and the elected Town Council to find a temporary and/or permanent location in Aberdeen (Appendix O). The Town of Aberdeen is working strategically to revitalize its downtown business district. Several large buildings in the downtown Aberdeen area are set to be vacated in the coming year. The Aberdeen Planning Committee has already agreed to rezone land for a Conditional Use Permit for the school as needed and will provide support to obtain the Education Certificate of Occupancy - joseph_maimone</p>
<b>Financial Plan</b>	<p><u>Budget Revenue Projections from Each LEA (Table)</u> The enrollment projection aligns with Section I yet does not appear sustainable for a first year school. - gscherbeck</p> <p><u>Budget Revenue Projections from Each LEA (Table)</u> The enrollment aligns but concerns about sustainability (as mentioned in other sections) remain. - nacharles</p> <p><u>Budget Revenue Projections from Each LEA (Table)</u> Explain other funds. Why no App M? - joseph_maimone</p> <p><u>Budget Revenue Projections from Each LEA (Table)</u> Attach Appendix "M". Other Funds? - haparler</p> <p><u>Total Budget Revenue Projections 2018-2023 (Table)</u> Appendix M is not attached. Thus, it is difficult to determine if the provided budget is a realistic outline. - gscherbeck</p> <p><u>Total Budget Revenue Projections 2018-2023 (Table)</u> The revenue is fully explained, however, is the budget realistic given the population? An increase in required EC could easily absorb the fund balance (need a full-time EC teacher etc.) - nacharles</p> <p><u>Total Budget Revenue Projections 2018-2023 (Table)</u> What are "the other funds"? - mycah068</p> <p><u>Total Budget Revenue Projections 2018-2023 (Table)</u> Low numbers a great budget challenge - joseph_maimone</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> \$55,000 is a rather low salary for a school leader. - gscherbeck</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u></p>

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<p>How will you attract and retain the administration with a low salary? How will the EC Coordinator be able to do all of the work with a half time position? It appears that the EC Coordinator will be well paid the first year but the same as a regular teacher in the coming years. How will you retain the EC Coordinator? How will the one Teacher Assistant that is CDL licensed be compensated compared to the other Teacher Assistants who do not have this extra duty? - brian_smith2</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> Is there a contingency plan for Exceptional Children if a child enrolls that requires a Separate Setting since only a half time EC Teacher is budgeted? - kevin_allen</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> Aforementioned concerns about pay scale remain: -is \$55,000 Head of School salary realistic given the work load -can teachers with more than three years experience, as proposed, be recruited at \$40-47,000? -what happens to the budget if increased EC services are required? - nacharles</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> There are a number of budget items that present concerns. \$10,000 for all nutritional needs is low. \$72,000 for the facility lease / mortgage is low. \$0 is budgeted for copy paper. \$5,000 for curriculum / texts is low.</p> <p>- gschermbek</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> Applicant needs to clarify: Outlined in the application is the use of beautiful independent work boards- is this materials and creation of these resources budgeted in the Instructional Materials Section? - kzparker718</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> How will technology goals be addressed with the small amount of funds? - brian_smith2</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> Have funds been budgeted for the provision of related services such as OT, PT, Speech, Psychological Services etc., as may be outlined in an child's IEP? - kevin_allen</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> Across the board, are the supply projections realistic? - where is the bus contingency fund? - how can such a small office budget support the resource heavy curriculum? -how can the detailed marketing plan be actualized with \$2500?</p> <p>How can the difference in insurance budget projections and insurance quote be explained? - nacharles</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> skeleton budget expenditures due to low numbers. Explain contingency - joseph_maimone</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> Operations budget is very low. (Admin. and support, Instructional) - haparler</p>
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	<p><u>Total Expenditure Projections (Table)</u> The surplus is incredibly low for the first 4 years of operation. A deeper analysis of the budget should take place. - gscherbeck</p> <p><u>Total Expenditure Projections (Table)</u> Can the low fund balance in year one sustain any unforeseen circumstances? - nacharles</p> <p><u>Total Expenditure Projections (Table)</u> Explain contingency use Explain other revenue - joseph_maimone</p> <p><u>Budget Narrative</u> The applicant does not provide a detailed description or evidence of demand for this school. Appendix M is not attached and thus the financial contingency plan is difficult to assess. Given the previously listed budget concerns, it is difficult to determine the financial viability of this plan. - gscherbeck</p> <p><u>Budget Narrative</u> Can the applicant provide more detail on contingency plans?  The budget is not realistic for financial viability given the mission and educational plan. - nacharles</p> <p><u>Budget Narrative</u> Elaborate on partnership with pre-school program. Why will they pay MMCS if they are already operating? - joseph_maimone</p>
<b>OVERALL</b>	<p><u>Grade Levels Served and Total Student Enrollment:</u> 90 students across three grade levels seems small. The applicant should provide additional background regarding this decision and how the school will be financial stable with the small student enrollment. - gscherbeck</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> Where is the signature? - mycah068</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> The low enrollment projections makes sense for the Montessori model but can the applicant remain financially sustainable? - nacharles</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> Concern about very low numbers for beudgeting - joseph_maimone</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> Why K-6? - hparler</p>

<b>Charter School Advisory Board Subcommittee</b>	
<b>Mission, Purposes, and</b>	

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<b>Goals</b>	
<b>Education Plan</b>	Ms. Reeves wanted to know if the school would use any standardized tests. Ms. Rucker indicated that the school planned to integrate several different types of standardized tests. Ms. Reeves asked about whether a student would be able to integrate back into a traditional model if they left the school. Ms. Rucker indicated that a student would be able to transition back to a traditional model.
<b>Governance and Capacity</b>	Ms. Parler wanted clarification on how the board plans to operate considering the chair and vice chair both live out of state. Ms. Rucker explained her plans to move to the area. Ms. Ledley shared her commitment to the board and school, despite living out of state. Mr. Sanchez wanted to know about the development of the professional development. Ms. Rucker detailed the methods for developing the professional development plan around the Montessori model.
<b>Operations</b>	Mr. Quigley wanted to know why the school didn't utilize a weighted lottery in light of the schools desire to be a diverse school. Mr. Quigley also wanted to know about the marketing and recruiting strategies that would be utilized. Ms. Rucker indicated that the school would spend the planning year doing educational outreach to recruit students and help explain the Montessori model. Mr. Helton wanted clarification on the EC services provided, especially the portion of the application that discussed the recommendation of medication students. Ms. Ledley indicated that the school would not make medication recommendations. Ms. Parler wanted clarification on the survey of parents about EC services. Ms. Ledley indicated that the survey would be conducted through conversations and meetings with the parents. Mr. Walker asked if the school would be open to increasing the size of the initial cohort if the demand was there in the planning to open process. Ms. Rucker indicated that the school would be open to increasing the size of the initial cohort.
<b>Financial Plan</b>	Mr. Walker expressed concern about the budget, especially as it relates to the relatively small initial cohort of students. In response, Ms. Rucker indicated that the initial cohort size was developed as a result of talking to existing Montessori schools and looking at the area to be served. Mr. Quigley also wanted clarification on the initial budget and cohort. Ms. Rucker indicated that the school would begin aggressively fundraising in the planning year. Mr. Quigley wanted clarification on the surplus and contingency plan. In the event of losing students, Ms. Rucker indicated that the school would have to make adjustments to the budget.
<b>OVERALL</b>	Mr. Walker wanted to know why the school chose to locate in Moore County. Ms. Rucker explained her connection to Moore county and plans to move there. She also described the existing educational gaps for students in Moore County. Mr. Helton asked if Ms. Rucker was planning to be the lead administrator. Ms. Rucker indicated that she was interested in founding and running the school. Per Mr. Quigley's request, Ms. Johnson detailed how she became affiliated with the school and what her understanding of her role on the board would be. She indicated that she would be involved with hiring and training teachers and development of curriculum. Mr. Green also detailed his recruitment to the board. He stated that he has experience with hiring, professional development, budget implementation and operational efficiency. Mr. Quigley expressed his excitement about the school and recognized the value it could bring to the area. Mr. Sanchez also expressed his excitement about seeing an innovative model, but cautioned that the budget will be tight. Mr. Hawkes and Mr. Helton expressed their excitement for the school and innovative model. Ms. Gibbs complimented the school on their transportation plan and the relationships built with local stakeholders. Mr. Sanchez made a motion to send the school forward for state board of education approval; Ms. Parler seconded the motion. The

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	motion carried unanimously.
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<b>Overall Summary</b>	
<b>Initial Screening</b>  <b>09/30/2016</b>	<p>The Office of Charter Schools deemed this application incomplete on September 30, 2016. The following is needed for the application evaluation:</p> <p>(1) Appendix M to support the "Other Funds" identified in the financial section of the application</p> <p>Applicant responded to the incomplete submission request on October 6, 2016.</p>
<b>Application Review</b>	<p>OCS provided a brief overview of the proposed application including the enrollment over five (5) years, proposed county, and mission of the proposed school. Two board members were present for the application review, discussion, and clarification opportunity.</p> <p>The Performance Committee (PF) led a discussion and asked specific questions on major sections of the application. The Montessori model description in the application was commended by the CSAB committee to the applicants. Ms. Schauss was asked to clarify the Montessori Model at Sterling Montessori. The board chair, from the county, is planning to be the head of school. Ms. Turner and the PF asked why the school did not apply for a weighted lottery given its proposed targeted population. The board chair outlined that the weighted lottery can be explored later. Mr. Hawkes questioned if this model was appropriate in Aberdeen and the proposed student population. The board chair outlined that the model is structured and has been successful with the proposed student population.</p> <p>Mr. Quigley and other members of the PC were concerned about the size of the school; however the application is well written. He reiterated that an application must be well written. Additionally, Mr. Quigley communicated that other pieces could be explored during the interview. The board of the school outlined its reason for starting small due to the model and advice received from others doing this work. Mr. Sanchez outlined this application was innovative and would love to hear more in an interview.</p> <p>Mr. Sanchez made a committee motion for an interview. Ms. Parler seconded. Mr. Hawkes was concerned about this model with the proposed student demographic. Mr. Maimone encouraged the group to take notes and be prepared to answer questions during interview. The committee motion passed unanimously for interview.</p> <p>Mr. Maimone made a motion to the full CSAB and recommended an interview for Moore Montessori Community School. Mr. Helton seconded. The motion passed unanimously.</p>
<b>Application Interview</b>	<p>The Office of Charter Schools provided a brief update on the proposed school. 5 proposed board members introduced themselves to the CSAB and provided a brief professional history and explained their respective role on the board of directors for Moore Montessori Community School.</p>
<b>OVERALL</b>	<p>Mr. Sanchez made a motion to send the school forward for state board of education approval; Ms. Parler seconded the motion. The motion carried unanimously.</p>