



*island*  
montessori charter school

CHARTER SCHOOL APPLICATION

NORTH CAROLINA DEPARTMENT OF PUBLIC INSTRUCTION

NC Department of Public Instruction

Office of Charter Schools

301 N. Wilmington Street

Raleigh, NC 27601-3491

Due by: April 13, 2012

NAME OF PROPOSED CHARTER SCHOOL: Island Montessori Charter School

NAME OF NONPROFIT ORGANIZATION/MUNICIPALITY UNDER WHICH CHARTER WILL BE ORGANIZED OR OPERATED: Cape Fear Montessori Village, Inc.

HAS THE ORGANIZATION APPLIED FOR 501(c)(3) NON-PROFIT STATUS: Yes  No

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: Jennifer Friend

TITLE/RELATIONSHIP TO NONPROFIT: Founder/Lead Applicant

MAILING ADDRESS: 200B Spartanburg Avenue, Carolina Beach, NC 28428

PRIMARY TELEPHONE: 910-381-7567 ALTERNATE TELEPHONE: 910-382-3302

E-MAIL ADDRESS: Jennifer@islandmontessorischool.com

Location Proposed Charter School (LEA): New Hanover County

Conversion:

No:

Yes:  If so, Public  or Private:

If a private school, give the name of the school being converted:

If a public school, give the name and six-digit identifier of the school being converted: \_\_\_-\_\_\_-\_\_\_

Description of Targeted Population: Island Montessori Charter School will target students in Kindergarten through 2nd grade (expanding up to 8th grade by our fifth year) from Pleasure Island and the surrounding areas in New Hanover and Brunswick Counties. IMCS will not discriminate on the basis of race, religion, national or ethnic origin, color, age, military service, disability or gender, except where exemption is appropriate and allowed by law.

Proposed Grades Served: K-6 Proposed Total Enrollment: 240  
Projected School Opening Year: 2013 Month: August

School Year	Grade Levels	Total Projected Student Enrollment	Year Round	
			YES	NO
First Year	K-5	144		X
Second Year	K-6	168		X
Third Year	K-7	192		X
Fourth Year	K-8	240		X
Fifth Year	K-8	240		X

I certify that I have the authority to submit this application and that I was regularly involved in the development of this application. All information contained herein is complete and accurate, realizing that any misrepresentation could 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 applicant.

\_\_\_\_\_

*Signature*

LEAD APPLICANT

*Title*

\_\_\_\_\_

*Printed Name*

APRIL 11, 2012

*Date*

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## **I. MISSION, PURPOSES and EDUCATIONAL FOCUS (G.S.115C-238.29A)**

### **A. MISSION:**

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

The mission of Island Montessori Charter School is to enable children of diverse backgrounds to learn and grow at their own pace by offering a developmentally appropriate and challenging academic Montessori environment that models grace and courtesy and fosters a peaceful community of lifelong learners.

### **B. EVIDENCE FOR NEED OF THE PROPOSED SCHOOL:**

*Describe the community relationships forged in the preparation of the charter application. Provide information detailing how the community and parents have been involved in the formation of the proposed mission statement. Evidence of surveys, dates, times, and locations of public meetings discussing this proposed charter school can be used to demonstrate the level of public interest.*

IMCS posted information about its school mission, growth plans, Montessori education, and charter schools on its Web site. To help reach the community and gather feedback, a link to the site as well as a link to the IMCS online survey was posted in the local newspaper, The Island Gazette, as well as on the Carolina Beach Today Blog, and on the school's Facebook page.

A majority of the participants who responded to our survey indicated that they are in favor of the components of the school's mission and proposed curriculum:

How important are the following components of the School?

- Students learn at their own pace:  
58.2% Very Important, 32.8% Important, 7.5% Somewhat, 1.5% Not Important
- Self-directed, independent learning:  
46.3% Very Important, 40.3% Important, 7.5% Somewhat, 6% Not Important
- Peace Education:  
47% Very Important, 33.3% Important, 9.1% Somewhat, 10.6% Not Important
- Cultural Awareness:  
61.2% Very Important, 26.9% Important, 7.5% Somewhat, 4.5% Not Important
- Hands-on Materials:  
82.1% Very Important, 14.9% Important, 1.5% Somewhat, 1.5% Not Important
- Academic Excellence:  
83.6% Very Important, 13.6% Important, 1.5% Somewhat, 0% Not Important
- Parent participation welcome at the school:  
79.1% Very Important, 16.4% Important, 3% Somewhat, 0% Not Important
- Sense of Community:  
78.8% Very Important, 16.7% Important, 4.5% Somewhat, 0% Not Important

There are limited options in our community for parents seeking an alternative to the public school system. There are currently only two charter schools in New Hanover County: Cape Fear Center for Inquiry (which has over 300 students on its waiting list for 2012/13), and Wilmington Prep Academy (which has over 100 students on the wait list for Kindergarten for 2012/13).

A majority of the participants who responded to our survey also indicated that they are seeking other school options for their child and are in favor of having school choice in the community.

Are you looking for other school options for your child?

Yes	54.5%
No	19.4%
Maybe	25.8%

How important is it for you to have school choice in your community?

Very Important	74.2%
Important	19.7%
Somewhat Important	6%
Not Important	0%

Facts about the community:

The Board has identified Southern New Hanover County, specifically the Town of Carolina Beach, as its targeted site for Island Montessori Charter School. Carolina Beach is a rapidly growing coastal town located on Pleasure Island in New Hanover County in southeastern North Carolina. Carolina Beach is situated approximately 25 minutes south of Wilmington and lies between the Cape Fear River to its west and the Atlantic Ocean to its east.

The population of Carolina Beach in 2000 was 4,778. This represented a 31% increase from the 1990 population. The population in 2010 was 5,706, which represents a 21.4% increase from 2000.

The following information about Carolina Beach is represented in the Town of Carolina Beach 2008 – 2013 Parks, Recreation and Open Space Master Space Plan:

- The Town of Carolina Beach in particular and New Hanover County in general have experienced a high level of population and economic growth in recent years, particularly throughout the 1990's and into the 21st century. The result of this growth and development has been the exertion of tremendous pressures upon the Town of Carolina Beach to adequately meet the demand and need for public services.
- The Town of Carolina Beach underwent a dramatic transformation during the 1990s and is currently evolving into a heavily residential community dedicated to creating a wholesome family environment.

- When comparing the Town of Carolina Beach to other coastal communities, Carolina Beach ranks 3rd most populous among coastal/beach municipalities in North Carolina.
- Carolina Beach included 1,253 family households in 2000 with an average of 2.59 persons per family. (In 2010, the number of family households was 2,675 with an average of 2.12 persons per family.)
- When compared to other jurisdictions in the Carolina Beach area [Kure Beach (23%), Oak Island (29%), Surf City (24%) and Wrightsville Beach (26%)], Carolina Beach has a considerably higher percentage of its total “families” having children under the age of 18 (36%). Of these 1,253 family households, 454 (36%)
- The Town of Carolina Beach also has substantial population areas to the north and south of its planning jurisdiction. To the north there are as many as 10,000 people between Snow’s Cut and Monkey Junction. There are approximately 1,600 people to the immediate south in Kure Beach.
- In addition, the average size of families in Carolina Beach is larger than those other communities. This means that Carolina Beach has younger and larger families than the comparable coastal communities. Carolina Beach can expect a permanent population of approximately 7,200 in the year 2020.

#### Overcrowded Area Schools:

Considering the growth Southern New Hanover County has experienced over the last decade, it is not surprising that the area’s schools have become overcrowded. While it was not part of IMCS founders’ original mission to create a charter school to help alleviate the overcrowding that has taken place in the area’s schools, the Board certainly feels even more compelled to pursue its mission taking into consideration that a high-quality alternative school in our community will certainly help alleviate the burdens associated with overcrowding.

Of the three elementary schools in this area, Carolina Beach Elementary School is the most overcrowded, but there are currently no plans to alleviate the burden of overcrowding at the school. Per a conversation with Bill Hance, Assistant Superintendent of Operations for New Hanover County Schools, (April 8, 2012) the district does not intend to redistrict Carolina Beach Elementary School since the neighboring schools, Anderson and Bellamy Elementary, are also over capacity. To make room for students, Carolina Beach Elementary School has recently had to convert the school’s computer lab and music class into classrooms. The school’s art room is the last remaining space that could be converted into a classroom. Also, Carolina Beach Elementary School cannot accommodate mobile classrooms to increase classroom space, Mr. Hance said, because the town will not approve mobile classrooms on the school’s site since the school lies in a flood zone.

Carolina Beach Elementary: Max. Cap. = 378, Current Cap. = 483 (Over cap. by 108 students)  
Anderson Elementary: Max. Cap. = 585, Current Cap. = 656 (Over cap. by 71 students)  
Bellamy Elementary: Max. Cap. = 589, Current Cap. = 646 (Over cap. by 57 students)

**C. GOALS FOR THE PROPOSED CHARTER SCHOOL:**

A description of the student achievement goals for the school's educational program and the method of demonstrating that students have attained the skills and knowledge specified for those goals. These goals should include specific and measurable performance objectives over time. A timeline should be included to highlight how the school proposes to meet its objectives.

Island Montessori Charter School Student Achievement Goals 2013/14—2015/16
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Goals	Strategies	Measures
<p>Goal #1 – By the end of 2016, the percentage of students in grades 3 through 8 enrolled in their second year who will meet or exceed student proficiency levels in reading and math as demonstrated on the End-of-Grade assessment will be 5% above the state's average.</p> <p>What we know: The state's averages in reading and math.</p>	<p>Maintain consistent and thorough implementation of Montessori theory and pedagogy.</p> <p>Hire highly qualified and experienced instructors.</p> <p>Evaluate academic achievement against normative and criterion measures (test scores + progress reports) and adjust curriculum where necessary.</p>	<p>Normative assessments Student progress reports Teacher observations EOG scores</p>
<p>Goal #2 – At the completion of each school year, all students at Island Montessori Charter School will demonstrate visible and measurable annual growth goals.</p> <p>What we know: We know Montessori curriculum is effective at moving students their annual academic goals.</p>	<p>Establish baseline data at the beginning of each year for each student.</p> <p>Teachers adhere to the Montessori Method and maintain a prepared environment that has within it the following areas for learning: Language, Math, Geometry, Science, Sensorial, and Practical Life.</p> <p>Teachers use daily observations to ensure all students are acquiring mastery of essential skills and adjust curriculum or provide interventions as needed.</p>	<p>Formative and summative assessments Teacher observations Student work samples Portfolios</p>
<p>Goal #3 – By the completion of each school year, each student will complete at least one service learning or community service project.</p> <p>What we know: A school very connected to its community grows better citizens.</p>	<p>Plan three field trips a year.</p> <p>Forge partnerships with community members and local organizations, such as Pleasure Island Sea Turtle Project, NC Aquarium at Fort Fisher, Carolina Beach State Park, etc.</p> <p>Incorporate environmental education and community service lessons into the Montessori curriculum.</p>	<p>Completion of projects</p>



<p>Goal #4 – By the completion of each school year, all students will demonstrate increasing levels of respect for self and others, concentration, self-motivation, self-reliance, compassion, and discipline.</p> <p>What we know: The Montessori method is effective at creating well-rounded, productive citizens and creative thinkers.</p>	<p>All classrooms will be well ordered, thoughtfully prepared Montessori environments equipped with high-quality Montessori materials.</p> <p>Teachers will maintain uninterrupted, two- to three-hour morning work cycles to ensure students are free to concentrate on their lessons and are acquiring the traits of a normalized Montessori student.</p>	<p>Teacher, faculty, and parent observations Discipline Data</p>
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**D. PURPOSES OF PROPOSED CHARTER SCHOOL:**

*State the relationship between the six legislated purposes, as specifically addressed in the NC charter school statute GS 115C-238.29A, and the proposed school's operations.*

1) Improve student learning: Island Montessori Charter School will improve learning for students in Southern New Hanover County, by adding a high-quality public Montessori school to the area's current continuum of educational options.

Montessori has proven effective for over 100 years in developing young people who are adaptable, competent, confident, gracious, and serious about their roles as productive, compassionate stewards. Montessori students are capable of understanding and applying knowledge and skills in a multitude of careers and life paths. One of the biggest strengths of the Montessori method is that it produces independent, life-long learners. These are qualities that benefit children into high school and beyond.

The Montessori Method allows children to learn at their own pace in a nurturing and enriched learning environment, using the following: multi-age classrooms, specific self-correcting materials, and specially trained teachers. IMCS will also emphasize the exploration of art, music, Spanish, technology, environmental education, and community service by utilizing local resources and forging purposeful partnerships with local nonprofit organizations.

A 2006 study comparing outcomes of children at a public inner-city Montessori school with children who attended traditional schools indicates that Montessori education leads to children with better social and academic skills. The study was conducted by Angeline Lillard, who is a professor of psychology at the University of Virginia and has been studying Montessori's methods for more than two decades, and Nicole Else-Quest, a psychology professor at Villanova University.

During her comparison, Lillard discovered that the 5-year-old Montessori students in the study proved to be significantly better prepared for elementary school in reading and math skills than the non-Montessori children. The Montessori children also tested better on "executive function," which is described as the ability to adapt to changing and more complex problems, an indicator of future school and life success.

Montessori children also displayed better abilities on the social and behavioral tests, demonstrating a greater sense of justice and fairness. On the playground, the Montessori students were much more likely to engage in emotionally positive play with peers, and less likely to engage in rough play.

Among the 12-year-olds from both groups, the Montessori children, in cognitive and academic measures, produced essays that were rated as “significantly more creative and as using significantly more sophisticated sentence structures.” In social and behavioral measures, 12-year-old Montessori students were more likely to choose “positive assertive responses” for dealing with unpleasant social situations, such as having someone cut into a line. They also indicated a “greater sense of community” at their school and felt that students there respected, helped, and cared about each other.

Lillard concluded that when strictly implemented, Montessori education fosters social and academic skills that are equal or superior to those fostered by a pool of other types of schools.

2) Increase learning opportunities for all students, with special emphasis on expanded learning experiences for students who are identified as at risk of academic failure or academically gifted: Individualized instruction, which is the cornerstone of a Montessori education, will meet the needs of students at risk of academic failure as well as students who are academically gifted.

Island Montessori Charter School believes that all children should have an opportunity to learn in a way that is conducive to their individual learning style, in order that each student may have the opportunity to maximize their learning potential. Students at IMCS will follow an individual learning program, thus affording each student the opportunity to learn at their own pace in a nurturing and enriched learning environment, using multi-age classrooms, specific self-correcting materials, and specially trained teachers.

Currently, there are no Montessori schools in New Hanover County that serve children beyond Kindergarten. IMCS believes that this option should be available to all children, regardless of their academic level. In this way, all children within New Hanover Public Schools will have equitable access to the unique opportunity of attending Montessori school, and will therefore have increased opportunities to realize their full potential and have a positive impact of their community.

3) Encourage different and innovative teaching methods: Montessori curriculum is by definition a unique and innovative method, balancing the student’s freedom to explore with the responsibility to work and learn within a community. The Montessori approach fosters individualized learning, allowing students to achieve without pressure, frustration, or competition. The mixed-age classrooms provide the child the opportunity to be both student and teacher. The multi-sensory didactic materials meet the needs of a broad range of learning styles. There is a strong emphasis on personal responsibility, respect for the individual, building a sense of community, and love of work. The Montessori curriculum has shown that high achievers, as well as children who have been unsuccessful in other academic environments, can excel within the same setting.

Furthermore, our school will provide the only tuition-free, public Montessori option for families in New Hanover County.

4) Create new professional opportunities for teachers, including opportunities to be responsible for the learning program at the school site: The opening of Island Montessori Charter School will create professional opportunities for teachers, and IMCS also plans to become an accredited Montessori teacher training site by 2015 (there is currently only one accredited Montessori training site in North Carolina). This will further provide opportunities for educators to work together, implementing Montessori philosophy into other schools, both public and private. IMCS plans to open new classrooms each year for at least the first five years, providing employment opportunities for teachers.

Since our teachers will be the cornerstone to the school's success, it is expected that they will be responsible for the school's learning program. The success of the Montessori method relies on having teachers who understand developmental theory and master skills in observation and assessment techniques, classroom management for individualization, and the carefully orchestrated sequences and activities in the curriculum.

5) Provide parents and students with expanded choices in the types of educational opportunities that are available within the public school system: Currently, Montessori is not offered in the public school system in New Hanover County. However, it has proven successful throughout the United States in the charter school model, offering an educational option for, and meeting the needs of, students of varying academic and socio-economic levels. Island Montessori Charter School selected the charter school model to integrate the principles of Montessori philosophy with the public school emphasis on standards-based education. Magnet schools and focus options seem more likely to be initiated and established by professionals from within the district rather than from without. Our founding board consists of members who have extensive expertise and experience in Montessori education, which will be most beneficial in a public charter school setting.

There is substantial need for public school options. There are currently only two charter schools in New Hanover County: Cape Fear Center for Inquiry, which has 361 students on its waiting list for 2012/13, and Wilmington Prep Academy, which has almost 100 Kindergarten students on its waiting list for 2012/13.

There are currently no Montessori schools in New Hanover County that serve children beyond Kindergarten. Island Montessori Charter School is true to Maria Montessori's belief that a Montessori education should be an option for all children and families.

6) Meeting measurable performance-based student achievement results: Montessori emphasizes the importance of observation to measure learning. The teacher observes and daily documents key information regarding student academic and personal progress. Through observation, the teacher and the student track work weekly to ensure that students are mastering essential skills and showing progress toward their annual growth goals. In addition to observation, IMCS will track student achievement with the use of EOGs, student work samples, portfolios, teacher surveys, summative assessments given at regular times throughout the school year.

### **E. Educational Plan**

*Describe briefly, limited to one page, the focus of the proposed charter school. This description will be used in public releases of information to interested parties, such as: the media, the State Board of Education, parents, school systems, and in various documents produced by the Office of Charter Schools. It must be concise and relate directly to the mission of the school.*

Island Montessori Charter School's three core goals are: academic excellence, social growth and emotional development, and active parent participation.

**Academic Excellence:** Island Montessori Charter School proposes to bring a public, tuition-free Montessori Charter School to New Hanover County, serving students in Kindergarten through 8th. IMCS is dedicated to improving student achievement and will implement a rigorous and challenging standard of education. The Montessori philosophy and environment prepares a child for success as a citizen of the world by teaching practical life skills, grace and courtesy, and peace education. The curriculum of the IMCS is a unique format, merging Common Core State Standards with the Montessori pedagogy. The Montessori scope and sequence is a challenging academic program that allows a child the freedom to motivate himself and take ownership of his own learning. The Montessori approach balances two interdependent elements: the students' freedom to explore and think for themselves and their responsibility to work and learn within a community. Historically, Montessori elementary students do well compared to their elementary peers and Montessori schools are highly rated academically. IMCS will continue this tradition by combining high standards with an innovative, engaging Montessori curriculum and teaching methods previously unavailable in local education.

**Social Growth and Emotional Development:** Montessori approaches children holistically. One of the core elements of Montessori education is to cultivate social and emotional growth through character education. Montessorians, including IMCS founders, believe that character education must be comprehensive and pro-active, and that to develop character, children need opportunities to engage in moral action and learn by doing. IMCS students will face real life challenges by working together cooperatively, helping others, and resolving conflict. Children learn to take care of themselves, their environment, and each other. Students in a Montessori classroom, in cooperation with their teacher, set their goals, manage their time, and take responsibility for their learning.

**Active Parent Participation:** The Montessori classroom fosters community spirit in the classroom and throughout the school. Just as IMCS students take responsibility for classroom jobs such as taking attendance, recycling paper, cleaning, and tending the garden, IMCS parents will take on a variety of roles that assure the school's operation. In this way, parents show children that their education is worthy of family effort. IMCS's vision is to meet the educational needs of children of diverse backgrounds and different learning styles, and to enhance the learning opportunities of its students to ensure a higher level of achievement. The Montessori approach emphasizes teaching with strong links to parents, family, and the larger community to create trusting relationships and build on the strengths of diversity. To further ensure active parent participation, IMCS will offer Family Information Workshops throughout the year to educate families about the Montessori philosophy and to give parents an opportunity to meet and connect with other IMCS families. Parents are strongly encouraged to volunteer at least 20 hours each school year.

## II. GOVERNANCE

### **A. PRIVATE NONPROFIT CORPORATION**

The nonprofit corporation must be officially authorized by the NC Secretary of State by the final approval interview date. (G.S.115C-238.29E)

Name of Private Nonprofit: Cape Fear Montessori Village, Inc.

Mailing Address: 200B Spartanburg Avenue

City/State/Zip: Carolina Beach, NC 28428

Street Address: same as above

Phone: 910-381-7567

Fax:

Name of registered agent and address: Jennifer Friend, same as above

FEDERAL TAX ID:

### **B. TAX-EXEMPT STATUS** (501 (c)(3) (G.S.115C-238.29B(b)(3))

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

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

NOTE: 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. (G.S.115C-238.29E(b))

**C. PROPOSED EDUCATIONAL MANAGEMENT COMPANY (EMO or CMO)**

*If the Charter School plans to contract for services with an “educational management organization” or “charter support organization,” please specify the name of the company, address, website, phone number, contact person, fax, and email:*

This section is not applicable to Island Montessori Charter School.

*Please include a copy of the proposed management agreement of the specified EMO and explain how the contract will be in the best educational and financial interests of the charter school.*

N/A

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

N/A

*Provide and discuss performance and financial data from other schools managed by the management company to demonstrate how this organization is a good fit for the proposed population of students.*

N/A

*Describe how the governance structure will be affected; if at all, by the EMO/CMO and particularly discuss how the board of directors of the charter school will govern the school independently of the EMO/CMO. An organizational chart showing the lines of authority should be included.*

N/A

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

N/A

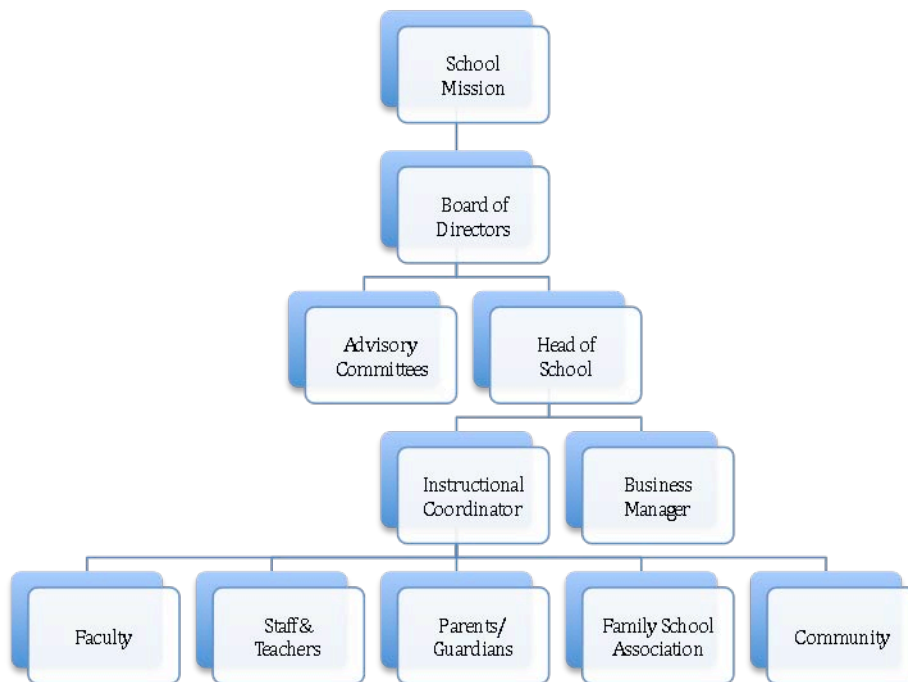
**D. ORGANIZATIONAL STRUCTURE OF PRIVATE NONPROFIT:**

(GS 115C-238.29B(b)(3); GS 115C-238.29E(d))

*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 provide the following in this location of the APPLICATION: (Do not include as an 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 as well as any advisory council. This chart should also include lines of authority to and from any outside entity that will play a role in managing the charter school.*



2. Each founding board member must submit, in this section of the application, a one-page resume highlighting his or her experiences over the past ten or more years.

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## MELINDA G. CUMMINGS

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7413 PROMONTORY COURT, WILMINGTON, NC 28412 (910)-508-3224

### EDUCATION

University of Creighton School of Law, Omaha, Nebraska, Cum Laude, Juris Doctorate

Marshall University, Huntington, WV, B.A.: Political Science

### EMPLOYMENT

- 1999-Current  
United States District Court for the District of Nebraska  
Law Clerk to Chief Judge/Judge Joseph F. Bataillon
- 1990-1999  
College of St. Mary, Omaha, Nebraska  
Assistant Professor/Director of Paralegal Studies
- 1986-1990  
Schmid Mooney and Frederick Law Offices, Omaha, Nebraska  
Litigation Attorney

### ACTIVITIES AND AFFILIATIONS

- *Montessori Parents' Co-Op for Children, Inc., Omaha, Nebraska*  
Founder, President and Vice President of the Board for 15 years  
Responsible for hiring, firing, compliance regulation, budget, drafting of policy and procedural manuals, long term and short term planning, board management, expansion, and fundraising
- *Member of the Gifted and Talented Advisory Committee* for the Superintendent of Omaha Public Schools for six years (District serving 45,000 students)  
Responsible for submitting proposals to Superintendent to improve services to gifted and talented students in grades K-12
- *Dreams of Wilmington*  
Member of the Board of Directors, Secretary, Member of the Executive Committee, and Fundraising Committee 2008-2012
- *Member of Carolina Beach Island Women, 2011-2012*
- *Member of the Nebraska State Bar and Omaha State Bar*



## Michael Stuart Davenport, Esq.

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2505 South College Road – Wilmington, North Carolina 28409  
Phone: (910) 362-9500 Email: [msdesq@mdavenportlaw.com](mailto:msdesq@mdavenportlaw.com)

### PROFILE

Experienced, successful attorney with extensive background encompassing specialized areas of the legal profession, in commercial transactional and litigation contexts. Demonstrated strength in the drafting and negotiation of complex business acquisition and operation contracts. Diverse skills in negotiation and interaction with clients and adversaries of myriad backgrounds.

### ADMITTED

- State Bar of North Carolina - April 1997
- State Bar of South Carolina - May 1997
- State Bar of California - December 1991
- United States District Courts: Central District of California - October 1995  
Eastern District of North Carolina - April 1998

### EXPERIENCE

Principal Attorney  
*The Law Office of Michael Davenport, P.C.* September 1999 to Present  
Wilmington, North Carolina

- Practice confined to (i) contracts, business formation and other aspects of business law, and (ii) valuation litigation, primarily in the fields of eminent domain/condemnation and insurance coverage/losses, but encompassing also complex personal injury claims, in state and federal court in the States of North Carolina, South Carolina and California.

Associate Attorney  
*Kaufman & Green, L.L.P.* September 1997 to September 1999  
Wilmington, North Carolina

- Practice confined to business law, including all phases of strategic planning and transactional work, handling full gamut of commercial matters, including banking/lender liability, healthcare law, mergers and acquisitions, stock transactions, and negotiation and drafting of sales and service contracts, as well as formation of all manner of business entities. Responsible for the entirety of the firm's commercial litigation caseload, including trial preparation, mediations, arbitrations and trials.

Associate Attorney  
*Law Offices of Gregory A. Yates* December 1991 to December 1996  
Beverly Hills, California

- Sole associate/trial preparation attorney in high-volume, high-profile litigation practice, encompassing breach of contract and all other commercial matters, as well as police misconduct, product liability and other complex plaintiff's personal injury work. Personally prepared all cases for trial, with Principal, Gregory A. Yates, Esq., ultimately named *California Lawyer of the Year* by *California Lawyer Magazine* for cases handled together during 1995 and 1996.

Law Clerk  
*Los Angeles County District Attorney's Office* August 1990 to December 1990  
Beverly Hills, California

Law Clerk  
*California Department of Fair Employment and Housing* May 1990 to August 1990  
Los Angeles, California

### EDUCATION

*Southwestern University School of Law* Los Angeles, California  
Juris Doctor May 1991

- Paul Wildman Scholarship recipient, 1988 -1991
- Dean's List Award recipient, 1989-1990
- Graduated, top 25% of class

*University of Wisconsin* Madison, Wisconsin  
Bachelor of Science May 1987

- English Literature, with American History minor

## Stephanie Lancaster, MBA

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928 Coast Walk Lane, Carolina Beach, NC 28428 ♦ [Steph.Lancaster@charter.net](mailto:Steph.Lancaster@charter.net) ♦ 910-795-9393

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### **TEACHING**

I am a trained Zenger Miller Management Facilitator and I enjoyed teaching many classes internally to our management staff while at PPD. My master's thesis, *Variables Affecting MBA and MSB Graduates' Compensation and Pay Satisfaction*, explored work/family variables through a large survey of North Carolina business graduates.

### **PROFESSIONAL EXPERIENCE**

#### **Fabricwrapper, LLC**

January '08 - present

#### **Owner**

Founder of Fabricwrapper.com. Involved in all areas of start-up from product design, production selection, and financial analysis. Facilitate website design, marketing plans, order fulfillment and vendor relationships. Advertising includes third party on-line presence, celebrity gift-bags, eco-friendly conventions/ Green Festivals and aggressive pursuit of wholesale markets.

#### **PPD, Inc., Corporate Headquarters, Wilmington, NC**

#### **Compensation Analyst**

May '03 – July '08

Completed solo and team compensation projects, including the benchmarking and data submission for multiple domestic and international salary surveys; annual market pricing, and the annual salary program analysis. Evaluated new and revised positions and work with internal clients on OD for their departments. Company contact for all North American Affirmative Action plans, led coordination of response to 4 OFCCP audits. Built a global recognition website for the company's diverse recognition initiatives.

#### **Human Resources Project Manager**

Per Diem assignments within the Corporate HR department utilizing multiple HR functional skills. Served as Co-leader on an 18-month project that merged 10 Lawson companies into one HR company. Designed the new structure and wrote and implemented a project plan to test and successfully implement the structure, while facilitating the consulting team and representatives from 5 business units. Other projects include work with Compensation, AAP, HRIS system testing and recruitment.

#### **Manager, EEO & HR Systems**

January '03 – May '03

#### **Human Resources Manager**

February '00 – January '03

#### **Senior Human Resources Representative**

April '99 – February '00

#### **Human Resources Representative**

May '97- April '99

#### **Benefits Coordinator**

October '96- May '97

#### **Applied Analytical Industries (Contract), Wilmington, NC**

#### **Human Resources Assistant**

May '96- October '96

#### **Executive Staffing Services, Greensboro, NC**

#### **Staffing Specialist**

September '95-April '96

### **EDUCATION**

**Masters in Business Administration** The University of North Carolina at Wilmington, 2000

**Bachelor of Arts** in Industrial Relations and Public Policy Analysis, UNC at Chapel Hill, 1995

**Professional in Human Resources**, certification received 1998

### **ACTIVITIES AND HONORS**

SHRM, 1995-2007, Programming Chair on Cape Fear's chapter executive board 2002 & 2003, elected to attend SHRM Leadership Conference in DC in 2003; Extensive Continuing education conferences in HR field; Red Cross Advisory Board Volunteer 2005-2007; Web Master for CFM&M Chapter, 2006; School classroom volunteer 2008-2011; Associate Director on Board of Directors, Cape Fear Credit Union, 2001; Junior Achievement Volunteer; Team leader for United Way, Juvenile Diabetes, and the Cystic Fibrosis fund raisers, 2001 & 2002; Assistant Girl Scout Leader, 1996; Planned Parenthood volunteer, 1997; Tomorrow's Leaders Today National Community Service award, 1995

## Steve Shuttleworth

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808 Carolina Beach Ave N #1, Carolina Beach, NC 28428 (719)499-1373

**Council Member, Town of Carolina Beach**  
**President, Shuttleworth Inc.**  
**Broker, Shuttleworth Realty, LLC**

Steve Shuttleworth is married and has five children. He and his family reside in Carolina Beach, NC. He is currently serving a four-year term on the Carolina Beach Town Council and holds the position of Mayor Pro Tem. He is involved in numerous community activities and owns several businesses.

A twenty-six year veteran in the real estate industry, Mr. Shuttleworth began his real estate career in Colorado Springs, Colorado where he has been a licensed Real Estate Broker since 1986. While in Colorado, he was owner and partner of Fidelity Real Estate and Development Company. As a seasoned real estate developer/broker he has extensive hands-on experience in acquisition, planning, entitlement, construction, sales, and marketing of residential and mixed use developments. He also founded Colorado Coastal Development Company and was pivotal in establishing a limited liability development company that provided development services to more than 18 different development projects. Mr. Shuttleworth was a partner in a Wilmington Mixed-Use Redevelopment project from 2006 through 2011.

Mr. Shuttleworth currently owns Shuttleworth Inc., a real estate development and consulting company that provides in-depth analysis and project, and Shuttleworth Realty, a full-service real estate brokerage company that represents clients in the purchase and sale of real estate throughout North Carolina. Mr. Shuttleworth is also an owner and partner in several residential development properties in Southeastern North Carolina.

Mr. Shuttleworth has always given back to his community profession. He served two terms as a planning commissioner in Colorado Springs, including a term as Chairman. He also served over 10 years on the Colorado Association of Realtors state board of directors and was elected the President of the largest realtor association in Colorado. While serving on that association board for many years, he held leadership positions of Treasurer, Vice Chairman, and Chairman of the Government affairs committee. He was selected as Realtor of the Year by the Pikes Peak Association of Realtors in 2003.

### **Professional Activities:**

Licensed real estate broker, North Carolina and Colorado State

### **Education:**

Real Estate Institute received Associate and Broker licenses 1985, 1989

Ohio Wesleyan University 1978-1983

Air Academy High School 1975-1978

### **References:**

Rick Catlin: New Hanover County, County Commissioner

Michael Cook: Attorney at Law

James Berger: Founder Fidelity Real Estate Dev Co.

Terry Storm: CEO Pikes Peak Association of Realtors

### **Additional business relationships:**

Shuttleworth Inc

Shuttleworth Realty LLC

R3 Petroleum LLC

Sidbury Land Holdings LLC

Avalon Development LLC

Manitou Spa LLC

## Jill Bean Davenport

### EDUCATION

Bachelor of Science in Nursing (May, 1993)  
East Carolina University, Greenville, North Carolina  
Pfeiffer College, (August, 1987- May, 1989)

### THERAPEUTIC EXPERIENCE

Infectious Disease (HIV, AIDS)	Neurology
Respiratory (COPD)	Oncology
Cardiovascular (Hypertension, Stroke)	Geriatrics
Nephrology	Diabetes

### PROFESSIONAL EXPERIENCE

#### Clinical Research

Pharmaceutical Product Development, Wilmington, NC 2004-2006  
Clinical Research Associate

Brookins Consulting, Inc., Wilmington, NC 2003-2004  
Clinical Research Associate Assistant

#### Nursing

Carolina Medical Solutions, Inc., Wilmington, NC 1998-2003

Founder and independent consultant for health care cost/billing auditing company. Audits, identifies and reports healthcare overcharges, false documentation and medical fraud to appropriate facilities, and –as and oversight of auditing process, and identification and coordination of a team of professional nurse auditors, sales, software and other business associates to service projects.

Well Care Nursing Services, Inc. Wilmington, NC	1998-2002
Tileston Diabetic Clinic, Wilmington, NC	1998-2002
Professional Personnel Consultants, Wilmington, NC	1997-1998
Harborview Health Care Center, Wilmington, NC	1996-1997
Granite Mountain Home Care, Prescott, Arizona	1995-1996
Grief Workshop, Co-facilitator, Prescott, Arizona	1996

#### Pharmacy

Pharmacy Services, Inc., Leland, NC 1999

### LICENSES AND CERTIFICATIONS

Registered Nurse, State of North Carolina

### VENDOR EXPERIENCE

- Medisearch International – Data Management
- Biomedical Solutions – Central ECG
- Phase Forward - Electronic Data Capture Inform Version 4.0
- Covance & Lab Corp - Central Laboratories
- Quest Central Laboratory
- Universal Solutions – Drug Destruction
- Virco, Virologic – Genotype/Phenotype Testing
- Clinphone – IVRS
- Johnson & Johnson

**Christina M. Dees**  
1030 Waterview Court  
Carolina Beach, North Carolina 28428  
919.608.5011  
christinamdees@gmail.com

**Profile:** Experience in small business start-up/management and immersion in the Latino culture. A passion for fostering growth & success in others and helping those in need. Fluent in Spanish and American Sign Language.

**Education:** **August 1997 to August 2001 / Southern Illinois University (SIUC)**  
*B.S. in Speech Communication, Persuasive Speaking [3 credits shy of a minor in Spanish]*

**Experience:**

July 2006 - Present **Zipwhiz, LLC**, an e-commerce company  
*Co-owner*  
Partnered with my husband, we own and operate a small internet business with less than 5 employees. My responsibilities include managing company finances, including preparing taxes, and anything HR related.

August 2006 - August 2008 **Bilingual Concepts, LLC**, a language school, Raleigh, NC  
*Owner/Founder*  
Founded a successful language school that provided Spanish & English classes and Interpretation & Translation services to local residents and businesses before moving to Costa Rica for a once in a lifetime opportunity.

April 2006 - August 2008 **COAN**, a non-profit, Raleigh, NC  
*Program Manager*  
Responsible for managing all aspects of the daily operations for local non-profit, including financials & reporting to Board of Directors (BOD), BOD meeting preparation & minutes, and Email correspondence. Traveled with a team of orthopedists, anesthesiologists, and medical personnel to Nicaragua every 3 months for mission trips to the HEOBRA Hospital in Leon. Served as a Liaison between COAN and Nicaraguan government as well as the translator for each trip. Prepared equipment, arranged trip details for each trip and prepped each team before departure. Also acted as Treasurer during each trip and reconciled trip expenditures upon return. Responsibilities also included fundraising and organizing fundraisers.

January 2006 - April 2006 **Triangle Medical Professionals**, Raleigh, NC  
*Program Development Manager*  
TMP is a Physician Assistant owned, staffing company. Responsible for managing all aspects of the business from start-up, including the sales and marketing of new clients, maintaining relationships with current clients, and recruiting and interviewing new Physician Assistants. Supervise and create monthly schedules for a team of 9 Physician Assistants, in addition to preparing all office financials. Also, developed the Hispanic Support Program, which provides interpreting services to local medical offices.

April 2002 - May 2005 **Law Offices of Hodgdon & Schuette, P.A.**, Raleigh, NC  
*Firm Administrator*  
In charge of all promotions for the firm, including yellow page and direct mail advertising. Screen all potential clients for lead attorneys. Promote the value of firm services to land important accounts. Generate new clients for the firm through my contacts in the community. Manage entire office financials, including payroll, payroll taxes, and accounts receivable/payable. Manage all client files, interview and train new employees, draft claim letters to insurance companies, and prepare all disbursements.

**Other Experience:**

September 2010 - Present **Carolina Beach Recreation Center**, Carolina Beach, NC  
*Fitness Instructor*

August 2005 - December 2005 **Culturlingua**, Los Reyes, Michoacan, Mexico  
*ESL Teacher for Private English School*

April 2007 - August 2008 **Aradia Fitness**, Raleigh, NC  
*Fitness Instructor*

August 2008 - October 2009 Lived abroad in Costa Rica

**Community Involvement:**

Current Host Family for UNCW International Student Exchange Program - 2011 to present  
Spanish Interpreter for Honduras Medical Mission - 2004 & 2005  
Former Wake County Guardian Ad Litem - 2003 - 2005  
Volunteer at NC Academy of Trial Lawyers Mock Trial Competition - 2003 - 2005  
Former Member of the Raleigh Jaycees (Miss Brookhill Steeplechase - 2004)

## Jennifer A. Friend

200B Spartanburg Avenue, Carolina Beach, NC 28428 (910)381-7567, enniferjay1@hotmail.com

**Education.** UNIVERSITY of FLORIDA, Gainesville, BS in Journalism and Communications, May 2003

### Experience.

**7/2010—Present – Lead Charter School Proposal Writer/Grant Writer**, InterVisual Technology, Inc.

Responsible for developing proposals, writing grants, gathering supporting documentation, coordinating tasks with various members of IVT, and submitting proposals and grants in a timely manner, meeting all guidelines/requirements, and ensuring compliance with all applicable laws, regulations, policies, and procedures. IVT is a South Florida-based company that specializes in developing and managing online curriculum for secondary grades. IVT is opening its first charter schools in Florida in August 2012, using a blended model (online curriculum plus on-campus support).

**10/2008—10/2011 – Online English Instructor**, InterVisual Technology, Inc.

Instruct online courses for grades 6 through 10, including Language Arts, English, and Creative Writing. My main responsibilities include regular contact with students through email, online chat sessions, and phone conferences, as well grading assignments and updating course content and materials.

**8/2010—5/2011 – Substitute Teacher**, Montessori Children's School, Jacksonville, NC

Aided and assisted in classrooms as an assistant teacher as needed in Toddler, Primary, and Lower Elementary classrooms.

**8/2006-9/2008 Language Arts Teacher**

Downtown Academy of Technology and Arts, a charter middle school in Fort Lauderdale, FL

- Taught grammar, writing, and communication skills to about 100 students in grades 6, 7, and 8.
- Prepared eighth grade students for FCAT Writing Plus, Florida's standardized writing exam. In my first year, the percentage of students who passed the exam went from 63% to 93%; the next year two of my students achieved a perfect score on the FCAT essay.
- Started an after school community service club, which participated in the 2007 AIDS Walk, cultivated and maintained an edible community garden, read stories weekly to preschool aged children, assisted teachers and volunteered services to the front office, and operated a school-wide recycling program.

**2003-8/2006 Stay-at-home mom**

**5/2002-5/2003 Finished degree** at University of Florida, Gainesville, FL

**Fall 2002 Intern Reporter/ Spring 2003 Freelance Writer**, *The Gainesville Sun*, Gainesville, FL

Generated story ideas, conducted interviews, and exemplified my ability to be reliable, creative and versatile by being on-hand to complete assignments as needed by the editor. Wrote numerous stories, covering a variety of topics such as city revitalization projects, arts and cultural events, and homelessness.

**5/2001-5/2002 Freelance Writer**, Jacksonville, N.C.

**5/2000-5/2001 City Government Reporter**, *The Jacksonville Daily News*, Jacksonville, N.C.

**8/1999-5/2000 Deerfield Times Reporter**, Sun-Sentinel Community News Group, Deerfield Beach, FL

**6/1998-8/1999 Reporter and Night Editor**, *The Independent Florida Alligator*, Gainesville, FL

**Marti Fuller**

133 Settlers Lane  
Kure Beach, NC 28449  
910-368-7025  
martifullerbeach@yahoo.com

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**College Practicum's**

Fall 1987 – Developmental Evaluation Center, Greensboro, NC  
Spring 1989 - Gateway Education Center, Greensboro, NC (A center for moderately to severely delayed 3-21 year olds.)  
Summer 1989 – Moses Cone Hospital, Greensboro, NC

**Education**

B.S. Speech-Language Pathology, UNC-Greensboro May 1988  
M.A. Speech-Language Pathology, UNC-Greensboro December 1989

**Job History**

1989 – 1992 Carolina Hearing and Speech, Inc. Greensboro, NC  
*Contracted to Public Schools: Speech Pathologist for 4 to 21 year old students*

1992 – 1995 Guilford County Schools, Guilford County, NC  
*Speech Pathologist for 3 to 21 year old students*

1995 – 1996 Sheri Bonner & Associates, Greensboro, NC  
*Speech Pathologist in pediatric private practice serving school age children*

1996 – 1998 Self-Employed, Greensboro, NC  
*Speech Pathologist in pediatric private practice, in homes and daycares and public schools*

1998 - 2003 New Hanover County Schools  
*Speech Pathologist for 3 to 21 year old students*

2003 - 2008 Not employed as a speech therapist: *Worked with developmentally delayed children and adults part-time*

2008 - Present Self-Employed, New Hanover County area  
*Speech Pathologist in pediatric private practice: serving pre-K through elementary age students at home and in schools*

*\*ASHA certified  
NC license #8761*

**Areas of Experience**

- Extensive pediatric experience over a 20 year period with mild to severe speech-language delays
- Experience with many types of impairments including autism, cerebral palsy, learning disabilities and mild to severe cognitive delays
- Frequent collaboration with parents and other professionals

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. (G.S.143.318.9 et seq)

BYLAWS OF  
CAPE FEAR MONTESSORI VILLAGE, INC.  
A North Carolina Nonprofit Corporation

ARTICLE I - Name and Office of Non-Profit Corporation

Section 1. Name: The name of the non-profit Corporation is *CAPE FEAR MONTESSORI VILLAGE, INC.* (hereinafter "CFMV"), duly authorized under the General Statutes of the State of North Carolina.

Section 2. Principle Office: The principle office of CFMV is located in Carolina Beach, in New Hanover County, in the State of North Carolina. The street address of the initial registered office of CFMV is: 200B Spartanburg Avenue, Carolina Beach, NC 28428, and the name of the initial registered agent at such address is Jennifer Friend. The Secretary shall note any change in principle office on the copy of the Bylaws maintained by the Secretary.

Section 3. Non-Discriminatory Policy: CFMV seeks diversity in its student/parent body, faculty, staff, administration, and board. CFMV does not discriminate on the basis of race, color, religion, national or ethnic origin, sex, age, disability, marital status, sexual orientation, or any category protected by law, in its educational policies, employment practices and all other school administered procedures and programs.

ARTICLE II – Purpose

The purpose of CFMV shall be to promote and enhance educational programs and opportunities for students living in Carolina Beach, Kure Beach, Wilmington and the surrounding. This may include providing support services for a public education system, establishing tutoring group(s), organizing before/after school programs, and establishing/operating a charter school or schools under North Carolina Charter School Statues (115C-238.29A et seq. of the North Carolina General Statutes) as permitted to be carried on by a nonprofit corporation pursuant to Chapter 55A of the North Carolina General Statutes, consistent with those portions of section 501(c)(3) of the Internal Revenue Code of 1986, as amended, relating to educational organizations, the provisions of the Act and other applicable laws.

ARTICLE III – Membership

CFMV shall have no members.

ARTICLE IV – Board Of Directors/Governance

Section 1. General Powers: The activities, affairs and business of CFMV shall be conducted by or under the direction of a Board of Directors ("the Board"). This Board is responsible for maintaining the integrity of all education efforts and programs offered by the corporation, ensuring the future of the corporation, and enhancing its reputation in the community. The Board shall operate in accordance with all fiduciary and regulatory statutes for nonprofits in North Carolina and as defined by the Internal Revenue Service.



## Section 2. Number, Qualifications, Election, and Term:

**Number:** The Board of Directors shall have a minimum of 5 and a maximum of 13 voting individuals ("Directors"). The initial Directors shall be nine (9) in number.

**Qualifications:** Each Director shall be at least twenty-one (21) years of age. Ideally Directors will represent a variety of backgrounds and interests from the broader community.

**Election:** Board Directors shall be elected at the Annual Meeting. The Executive Committee shall formulate a list of nominees who are qualified and willing to serve. In addition, a simple majority of the entire Board may petition to have a nominee put on the slate.

**Nomination:** Prior to June 1 in each academic year and at such times as there may be vacancies among the Elected Directors, whether by expiration of the terms of office, death, resignation, removal, or an increase in the number of Elected Directors, the Executive Committee shall nominate candidates for the vacancies which it recommends be filled and shall specify the number of such vacancies which are to be filled by the Annual Election of Directors, at an Annual or Regular Meeting or at such other time as may be appropriate.

**Eligibility:** The Board may elect any person who in its discretion it believes will serve the interests of CFMV faithfully and effectively. Employees of Island Montessori Charter School shall be eligible to serve on the Board as ex-officio, non-voting members. CFMV strives to have at least one of the persons elected to the Board who has Montessori training and/or experience.

**Annual Election of Directors:** At an Annual Meeting, or any subsequent Regular or Special Meeting, the Annual Election of Directors shall take place. The Board of Directors shall vote on the candidates to fill vacancies in the Elected Directors, and each candidate shall be elected by the vote of a majority of the whole Board of Directors. Voting shall be done by confidential ballot and the ballots shall be counted by the Secretary and confirmed by the President or the Vice President of the Board of Directors.

**Board of Election of Directors:** If any of the Elected Directors shall die, resign, refuse to act, or be removed from the Board of Directors, or if an Elected Director's term of office shall expire, the vacancy or vacancies created thereby shall be filled by the vote of a majority of the whole Board of Directors. Any Director so chosen shall have all of the rights and powers of an Elected Director and shall serve for the balance of the unexpired term of the Director whom he or she replaces.

The Board of Directors may create positions for additional Elected Directors for such term not exceeding three (3) years, as the Board of Directors shall determine. Any vacancy among the Elected Directors created by increasing the number thereof shall be filled by vote of a majority of the whole Board of Directors.

Upon a two-thirds (2/3) vote, the Board of Directors may abolish a vacant Elected Director seat, provided that the total number of Directors may not be less than that required by law or by these Bylaws.

**Term:** Unless otherwise provided by the Board at the time a Director is chosen, term of each elected Director shall be a period of three calendar years commencing with Regular Meeting following his/her election and continuing until a successor shall have been elected. No elected Director shall serve more than three consecutive three-year terms, unless the Board designates otherwise. The Elected Directors shall be divided into two classes, known as Class One and Class Two, for the purpose of staggering their terms in office. This will help balance continuity with new perspective. The terms of Elected Directors shall be fixed so that the terms of one-half of such Directors (as nearly as possible) expire at the close of each Annual Meeting.

Section 3. Meetings of the Board of Directors. The Board of Directors may transact any business permitted by these Bylaws at an Annual, Regular or Special Meeting as provided below.

Annual Meeting: Unless otherwise provided by the Board of Directors, the "Annual Meeting" of the Board of Directors shall be held in June of each year.

Regular Meeting: The Board of Directors may provide for holding of the "Regular Meetings" and may fix the time and place (which may be within or out of North Carolina) of such meetings. Regular Meetings shall be scheduled monthly.

Special Meeting: "Special Meetings" of the Board of Directors shall be called by the President or Vice President of the Board of Directors, at such time and place (which may be within or out of North Carolina) as may be specified in the respective notice or waivers of notice thereof. A Special Meeting shall be called by the President or Vice President promptly upon receipt of a written or electronic request to do so from a majority of the Board of Directors

Notice: Notice of the time and place of an Annual or Regular meeting shall be given to each Director either by messenger, regular mail, e-mail, or facsimile at least ten (10) days before the meeting. Notice of the time and place of a Special Meeting shall be given to each Director either by messenger, regular mail, e-mail, or facsimile not less than three (3) days before the meeting or upon reasonable notice under the circumstances where 3 day notice is impractical. Notices by messenger, regular mail, e-mail, or facsimile shall be sent to each Director at the number and/or address designated by him or her for that purpose. Oral or telephonic notices of meetings shall not be permitted. Neither the business to be transacted nor the purpose of any Regular or Special Meeting need to be specified in the notice or waiver of notice of the meeting, unless otherwise specified in the Bylaws or required by law. Unless otherwise required requested by statute, notice of any adjourned meeting need not be given.

Section 4. Conflicts of Interest. The Board of Directors affirms that the Directors, officers, administrators, faculty and other employees of the CFMV have an obligation to exercise their authority and to carry out the duties of their respective positions for the sole benefit of the CFMV. They should avoid placing themselves in positions in which their personal interest are or may be in conflict with the interests of CFMV. Where a potential conflict of interest exists, it shall be the responsibility of the person involved or any other person with knowledge to notify the Board of Directors of the circumstances resulting in the potential conflict so that the Board of Directors can provide such guidance and take such action as it deems appropriate. Areas of potential conflict of interest include financial interests, inside information, conflicting interests other than financial ones and gifts and favors. The Board of Directors shall, adopt a Policy on Conflicts of Interest to address these areas of potential conflict. In the event that any functions that are provided by institutional or contractual partners on behalf of the school result in a conflict of interest with any members of the CFMV Board of Directors, these Board members will recuse themselves from voting upon these matters.

Section 5. Quorum and Manner of Acting . At all meetings of the Board of Directors, a majority of the whole Board of Directors shall constitute a quorum for the transaction of business. Except as otherwise provided by statute or by these Bylaws, the act of a majority of the Directors present at any meeting at which a quorum is present shall be the act of the Board of Directors. In the absence of a quorum, a majority of the Directors present at the time and place of meeting (or one Director, if less than three (3) are present) may adjourn the meeting from time to time until a quorum shall be present.

Section 6. Resignations. Any Director may resign at any time by giving written notice of such resignation to the Board of Directors or the President of the Board of Directors. Unless otherwise specified in such written notice, such resignation shall take effect upon receipt thereof. If any Director shall fail to attend three (3) consecutive meetings

without an excuse accepted as satisfactory by the President of the Board of Directors, he or she shall be deemed to have resigned and the vacancy shall be filled.

Section 7. Removal or Suspension. Any Director may be removed or suspended from office by a majority of the whole Board of Directors. Such action shall be taken only upon written complaint of misconduct, incapacity or neglect of duty submitted to the Board of Directors. No Director shall be removed without being provided with at least seven (7) days notice of the proposed removal and copy of the complaint. If in the opinion of a majority of the whole Board of Directors such complaint shall have been sustained, the accused Director may be removed or suspended from office.

Section 8. Compensation of Directors and Officers. Directors, as such, shall not receive any salary for their services as Directors. Directors shall serve without compensation.

Section 9. Evaluations. Evaluations of the Head of School shall be conducted by the Executive Committee on an annual basis. Evaluations of the Board of Directors shall be coordinated by the Executive Committee on at least a bi-annual basis. Results of both evaluations, which may be in summary form, will be distributed to the Board of Directors, preferably in the middle of the school year. On-going informal assessments of the Head of School and the Board of Directors shall be conducted on an as-needed basis determined by the Executive Committee.

#### ARTICLE V - Officers of CFMV

Section 1. Designation of Officers: The officers of CFMV, all of whom shall be Board Directors, shall consist of a President, a Vice President, a Treasurer, a Secretary and such other officers as the Board of Directors may from time to time elect. The same person may not hold more than one office.

Section 2. President: The President shall preside over meetings of the Board of Directors and act as liaison between the Board and the Head of School. The President is responsible for the agenda for each meeting of the Board of Directors. Directors and Head of School may also request that specific agenda items be included, and the President shall accommodate such requests in so far as is reasonably possible.

In general the President shall perform all duties incident to the office of President and such other duties as may be prescribed by the Board of Directors from time to time. The President shall sign, with the Secretary, or any other proper officer of CFMV thereunto authorized by the Board of Directors, any deeds, mortgages, leases, bonds, contracts, or other instruments which the Board of Directors has authorized to be executed, except in cases where the signing and execution thereof shall be expressly delegated by the Board of Directors or by these Bylaws to such other officer or agent of CFMV. The President shall be a member of the Executive Committee and *ex-officio* member of the Finance Committee and shall serve on any other committee as directed by the Board of Directors.

Section 3. Vice-President: The Vice President shall, in the absence of the President or in the event of his or her death, disability or refusal to act, perform the duties of the President, and when so acting shall have all the powers of and be subject to all the restrictions of the office of the President. The Vice President shall perform such other duties as may be from time to time prescribed by the President or the Board of Directors. S/he will likely chair a Development Committee or similar committee.

Section 4. Secretary: The Secretary shall keep accurate records of the acts and proceedings of all meetings of the Board of Directors. The Secretary shall give, or cause to be given, all notices required by law and by these Bylaws. The Secretary shall have general charge of the corporate books and records and of the corporate seal, and the Secretary shall affix the corporate seal to any lawfully executed instrument requiring it. The Secretary shall sign such instruments as may require the Secretary's signature, and, in general, shall perform all duties incident to the office of Secretary and such other duties as may be assigned by the Board of Directors.

Section 5. Treasurer: The Treasurer shall be the financial officer of CFMV. S/he shall receive and deposit in a bank or banks to be approved by the Board of Directors all moneys of CFMV and shall keep an accurate account thereof. The Treasurer shall serve as Chair of the Finance Committee. The Treasurer shall be responsible for the funds, receipts, and disbursements of CFMV, payment of taxes, reports of the finances of CFMV annually and whenever requested by the Board, and adherence to government financial reporting and payment regulations. S/he will help the Head of School in the preparation of the annual budget and will cooperate fully in the annual Audit. The board may delegate day-to-day management of finances to the Head of School, Office Manager, or other responsible individuals approved by the Board. The Treasurer will be responsible for maintenance of the financial records of CFMV in good order. At the end of term of office, s/he shall deliver to successor all books, monies and other property of CFMV in her/his possession.

## ARTICLE VI - Committees

Section 1. General Powers and Responsibilities of Committees: Committees may assist the Board of Directors in its work. Chairs of committees should be board members, but committee members can come from board and non-board volunteers. Chairs of Committees report to the Board and take action from the board.

Section 2. Advisory Committees: The Board of Directors shall establish and maintain the following Advisory Committees: Executive, Academic, Finance, Development, Communications or any other committee the Board deems necessary.

Section 3. Committee Members: Chair. Members of committees shall be appointed annually by the President of the Board of Directors, subject to ratification by the Board of Directors in the first Regular Meeting of the Board of Directors held after the appointment. Vacancies in the membership of any committee shall be filled by appointment by the President of the Board of Directors after consulting with the Chair, if any, of such committee. Unless otherwise provided in these Bylaws, the membership of committees shall not be restricted to Directors but shall be drawn from the administration, faculty, parent body and community at large, as appropriate. Except as otherwise provided in these Bylaws or by the Board of Directors, the Chair of each committee shall be chosen by the President of the board of Directors from among the trustee members of the committee.

Section 4. Executive Committee: The Executive Committee shall consist of no less than three (3) members, including the Head of School, the President and Vice President of the Board of Directors and such other Directors as may be designated by the Board of Directors. The President of the Board of Directors shall be the Chair of the Executive Committee. The Executive Committee shall set the policy agenda, conduct evaluations of the Head of School and of the Board of Directors, coordinate committee agendas, and set the agenda for the full Board of Directors. The Executive Committee shall operate in place of the Board of Directors during those times when the Board of Directors does not or cannot meet. Between meetings of the Board of Directors, the Executive Committee may take any action on behalf of the Board of Directors that could be authorized by a vote of the majority of the whole Board of Directors or is limited to the Board of Directors by law. An action taken by the Executive Committee may be subject to ratification by the Board of Directors. A member of the Executive Committee shall record the minutes of each meeting and include a report on any actions taken. Such member shall forward the Minutes to the Secretary and the Secretary shall distribute the minutes of such meetings to the full Board of Directors.

Section 5. Finance Committee: The Finance Committee shall consist of no less than three members. The Treasurer or an Assistant Treasurer shall be the Chair of the Finance Committee. The Finance Committee shall be responsible for overseeing the preparation of budgets, financial reports and for supervising the management of CFMV's finances, including notifying the Board of Directors of significant deviations from the approved budget. The Finance Committee shall review, analyze and recommend for approval the annual audit. On a periodic basis, the

Finance Committee shall review investment policies, objectives, and performance. It shall work closely with the CFMV's business manager, if any, and the Head of School in overseeing the performance of the operations staff.

Section 6. Academic Committee: The Academic committee shall consist of no less than three members, and will strive to have at least one Montessori-trained Board member. The Academic Committee shall be responsible for evaluating whether CFMV is adhering to its Charter and achieving its goals of attaining high student academic achievement and preparing its students for success in their continuing education and active citizenship. It will examine the results from city, state, national, and internally developed assessments, which are both criterion and norm-referenced. In addition, the Academic Committee will meet with the Head of School to analyze assessment data. Based on the assessment data, the Academic Committee may make recommendations regarding the allocation of resources in terms of classroom materials, staffing, professional development, and outside consultants. The Academic Committee will also monitor the ongoing process of training Montessori teachers.

## ARTICLE VII – Policy, Procedure, And Restrictions

Section 1. Contracts: The Board of Directors may authorize any officer(s) or agent(s) to enter into any contract or execute and deliver any instrument in the name of and behalf of CFMV, and such authority may be general or confined to specific instances.

Section 2. Loans: No loans shall be contracted on behalf of CFMV and no evidence of indebtedness shall be issued in its name unless authorized by a resolution of the Board of Directors.

Section 3. Checks and Drafts: All checks, drafts, or other orders for payment of money issued in the name of CFMV shall be signed by such officer(s) or agent(s) of CFMV and in such manner as shall from time to time be determined by resolution of the Board of Directors.

Section 4. Deposits: All funds of CFMV not otherwise designated shall be deposited from time to time to the credit of CFMV in such depositories as the Board of Directors may select.

Section 5. Seal: The Board of Directors shall have the authority to prescribe a seal of CFMV. Until that time, as prescribed by law, official signatures are CFMV's seal.

Section 6. Waiver of Notice: Whenever any notice is required under the provisions of the North Carolina Nonprofit Foundation Act, or under the provisions of the Article of Foundation, or by these Bylaws, a waiver thereof in writing by the person(s) entitled to such notice, whether before or after time stated therein, shall be deemed equivalent to the giving of such notice. The Director entitled to the notice shall sign the waiver and it shall be filed with the minutes or corporate records.

Section 7. Fiscal Year: Unless otherwise ordered by the Board of Director the fiscal year of CFMV shall begin on September 1 and end on August 31 in the following calendar year.

Section 8. Annual Audit: The accounts of CFMV shall be audited on an annual basis by an independent, duly licensed, certified public accountant and the report shall be submitted to the Board of Directors.

Section 9. Parliamentary Authority: Robert's Rules of Order, Revised, shall constitute the ruling authority in all cases in which they are not inconsistent with these Bylaws or with any statute of the state.

ARTICLE VIII - General Provisions

Section 1. Nondiscrimination Policy: CFMV will not discriminate or otherwise prohibit any person from services (rights, privileges, programs, and activities generally accorded or made available to its students) on the basis of any race, color, age, gender, religion, sexual orientation, national/ethnic origin.

Section 2. Conflict of Interest Policy: All Directors of the Board shall abide by NC G.S. Section: 55A-8-31. If a matter comes before the Board which place a Director in a conflict of interest between the interests of CFMV and the interests of a Board Director, or a Board Director's family or business, that Director shall be prohibited from participating in the discussion or voting on the matter. Such a Director should be excused from the portion of the meeting where the matter is discussed and decided. A 2/3 majority of the Board may determine if a conflict exists.

Section 3. Whistleblower Provision: CFMV will provide a whistleblower policy for signed acknowledgement to all board Directors to encourage them, if they have good-faith serious concerns about misconduct, including violations of law, or other conduct, regulations or policies/procedures to raise the concerns with the entire Board before seeking external resolution.

Section 4. Indemnification of Directors and Officers: Each Director, employee, or agent of CFMV shall be entitled to indemnification or reimbursement by CFMV for any expenses or liabilities incurred by him or her under the circumstances permitting such indemnification or reimbursement under North Carolina Nonprofit Foundation Act and subject to the conditions and limitations on such indemnification and reimbursements set forth in said Nonprofit Foundation Act. The Board of Directors may purchase and maintain insurance on behalf of any person who is or was an Officer, employee or agent of CFMV against any liability asserted against him or her in any such capacity, or arising out of his or her status as such, whether or not CFMV would have power to indemnify him or her against such liability.

Section 5. Dissolution: Upon the dissolution of the organization, assets shall be distributed for one or more exempt purposes within the meaning of section 501(c)(3) of the Internal Revenue Code; or corresponding section of any future federal tax code, or shall be distributed to the federal government, or to a state or local government for public purpose. Any such assets not disposed of shall be disposed of by a Court of Competent Jurisdiction of the county in which the principal office of the organization is then located, exclusively for such purposes or to such organization or organizations, as said Court shall determine, which are organized and operated exclusively for such purposes.

Section 6. Amendments/Review:

a) These Bylaws may be amended, restated, or repealed and new Bylaws may be adopted by a two-thirds majority of the Directors holding office at the time of such proposed amendment(s) at any regular or special meeting of the Board of Directors provided that the Board of Directors shall have received written notice of such proposed amendment(s) along with notice of said meeting.

b) Beginning in the second year of CFMV, a committee of Board Directors shall review the Bylaws once annually to facilitate the best possible operation of school.

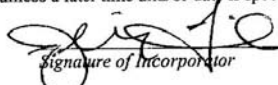
c) Any changes made to bylaws must be indicated in one official copy with the changes to original language indicated in strike-through text.

4. A copy of the Articles of Incorporation, if available. If not available, must be available prior to interview by SBE, so must show that it has been applied for prior to submission of application.

State of North Carolina  
Department of the Secretary of State

ARTICLES OF INCORPORATION  
NONPROFIT CORPORATION

Pursuant to §55A-2-02 of the General Statutes of North Carolina, the undersigned corporation does hereby submit these Articles of Incorporation for the purpose of forming a nonprofit corporation.

1. The name of the corporation is: Cape Fear Montessori Village, Inc.
2.  (Check only if applicable.) The corporation is a charitable or religious corporation as defined in NCGS §55A-1-40(4).
3. The street address and county of the initial registered office of the corporation is:  
Number and Street: 200 B Spartanburg Avenue  
City, State, Zip Code: Carolina Beach, North Carolina County: New Hanover
4. The mailing address *if different from the street address* of the initial registered office is:  
Same
5. The name of the initial registered agent is: Jennifer Friend
6. The name and address of each incorporator is as follows:  
Jennifer Friend; 200 B Spartanburg Avenue; Carolina Beach, North Carolina 28428
7. (Check either a or b below.)
  - a.  The corporation will have members.
  - b.  The corporation will not have members. Voting rights will be vested only in its Board of Directors, per its Bylaws.
8. Attached are provisions regarding the distribution of the corporation's assets upon its dissolution.
9. Any other provisions which the corporation elects to include are attached.
10. The street address and county of the principal office of the corporation is:  
Number and Street: 200 B Spartanburg Avenue  
City, State, Zip Code: Carolina Beach, North Carolina County: New Hanover
11. The mailing address *if different from the street address* of the principal office is:  
Same
12. These articles will be effective upon filing, unless a later time and/or date is specified: date of filing  
This is the 31 day of March, 2012.  
  
Jennifer Friend, Chief Executive Officer, Cape Fear Montessori Village, Inc.  
Type or print Incorporator's name and title, if any

NOTES:

1. Filing fee is \$60. This document must be filed with the Secretary of State.

Revised January 2000  
CORPORATIONS DIVISION

P. O. BOX 29622

Form N-01  
RALEIGH, NC 27626-0622

**RESOLUTION – BY INCORPORATOR – AT FORMATION/INCORPORATION  
REGARDING FATE OF ASSETS AT FUTURE/ULTIMATE DISSOLUTION OF  
*CAPE FEAR MONTESSORI VILLAGE, INC.***

It is hereby formally resolved by the undersigned Incorporator of *Cape Fear Montessori Village, Inc.* (hereinafter, sometimes referred to as the “Corporation”), that upon the dissolution of the Corporation – today formed, organized and otherwise incorporated by the ARTICLES OF INCORPORATION NONPROFIT CORPORATION to which this *Resolution* is appended – its assets shall be distributed for one or more exempt purposes within the meaning of section 501(c)(3) of the Internal Revenue Code, or the corresponding section of any future federal tax code, or shall be distributed to the federal government, or to a state or local government, for a public purpose. Any such assets not so disposed of shall be disposed of by a Court of Competent Jurisdiction of the county in which the principal office of the corporation is then located, exclusively for such purposes or to such organization or organizations, as said Court shall determine, which are organized and operated exclusively for such purposes.

In witness whereof, I have hereunto subscribed my name, this 27th day of March, 2012,

  
\_\_\_\_\_  
Jennifer Friend  
Incorporator and Chief Executive Officer,  
*Cape Fear Montessori Village, Inc.*



*5. A description of the governing board's functions, duties, roles and responsibilities as it relates to overseeing the charter school and its mission:*

The Board of Directors will ensure the success of Island Montessori Charter School through effective non-profit management, financial oversight, and active fundraising, evaluation, and support.

The Board will elect Directors through majority vote. The Board seeks to have at least one member on the Board who will have Montessori training and/or experience. The board will hold regular monthly meetings.

**General Responsibilities:**

The Board of Directors is responsible for ensuring that the academic program of IMCS is successful, that the school's program and operation are faithful to the terms of its charter, and that the school is a viable organization.

**Specific Responsibilities:**

1. Understand and support the mission and vision of IMCS and keep it clearly in focus.
2. Select the Head of School
  - Write the Head of School's job description
  - Negotiate and approve contract and renewal
3. Give support to the Head of School and assess his/her performance
  - Ensure effective organizational planning, including concrete, measurable goals that are consistent with the charter, accountability plan, and strategic plan
  - Evaluate Head of School's performance annually
4. Provide financial stewardship
  - Review and approve annual budget
  - Approve fundraising targets and goals and assist in carrying out development plans
5. Ensure that resources are managed effectively
  - Monitor budget implementation through periodic financial reports
  - Approve accounting and personnel policies
  - Provide for an independent annual audit by a qualified CPA
  - Ensure adequate insurance is in force
6. Monitor and strengthen the programs and services of IMCS
  - Ensure that the school's programs and services are consistent with the mission, vision and the charter
  - Approve annual attainable goals for the board and management
  - Monitor progress towards the attainment of goals and results
  - Assess the quality of the program and services

7. Enhance IMCS's public standing
  - Serve as ambassadors, advocates and community representatives of the school
  - Provide for a written annual report that details IMCS's mission, programs, financial condition, and progress made towards charter promises
8. Ensure legal and ethical integrity and maintain accountability
  - Establish policies to guide the school's board members and staff
  - Develop and maintain adequate personnel policies and procedures
  - Adhere to the provisions of the school's bylaws and charter
9. Recruit and orient new board members and assess board performance
  - Define board membership needs in terms of skill, experience and diversity
  - Cultivate, check the credentials of and recruit prospective nominees
  - Provide new board member orientation
  - Conduct an annual evaluation of the full board and individual directors
10. Individual members must inform the Board of Directors of any potential conflicts of interest, whether real or perceived, and abide by the decision of the board related to the issue.

#### Job description for members of the Board of Directors

##### General Board Member Description:

1. Attend monthly board meetings. Be accessible for personal contact in between board meetings.
2. Serve as an active, ongoing member of at least one committee.
3. Commit time to developing financial resources for the charter school.
4. Responsibly review and act upon committee recommendations brought to the Board for action.
5. Self educate on the major issues before the board.
6. Prepare in advance for decision-making and policy formation at board meetings
7. Participate in the annual board member self-review process
8. Participate in the annual board development and planning retreat held each year.
9. Use personal and professional skills, relationships, and knowledge for the advancement of the school.

#### *6. Explain the decision-making processes the board will use to develop school policies:*

The Board of Directors and the Director will work closely to develop the policies that will govern the school.

The process for developing policy will be:

Mission: Basic policies have been drafted at the time of this application. The mission that the founding board members created for the school have guided their drafting.

Once IMCS has hired a Head of School but before it opens school doors the policy manual will be finalized, with the school's mission, State law, charter school objectives, Montessori principles, and

evaluation guiding the writing.

Once school starts, recommendations for policy changes will come from any board member, the Head of School, or an employee or parent. The Board of Directors and the Head of School will then evaluate the need for a policy.

Once it has been established that there is a need for a particular policy, the Head of School and Board members will work together to propose wording for a policy that will meet the following criteria:

- a) The policy will directly address the issue that prompted the suggestion.
- b) The wording will be sustainable in that the policy should apply to and be relevant for all circumstances, including future situations and boards, recognizing the possibility and probability of growth and progression.
- c) The policy will not hinder the ability for the Board or the Head of School to efficiently operate and/ or support the mission or the Charter of the school.

After the policy has been deemed relevant and appropriate, the Board will vote the policy into effect as per its bylaws.

#### *7. Portray how the board will involve parents and community members in governing the school:*

In an effort to broaden the input and generate as many possible avenues for parents, teachers, and community members to invest in the development, activities, and governance of Island Montessori Charter School, Advisory Committees will be convened to advise and make recommendations to the Board. The committees that have been identified to convene include the following: Executive, Academic Advisory, Finance, Communications, Fund Development & Community Outreach, Facilities, and Volunteer & Enrichment Programs. The chair of each committee will be a Board member. Committees will be comprised of a minimum of one parent of an enrolled student, one educator that is an employee of IMCS, and one community member. Additionally, the Head of School may participate on any committee as a non-voting member. Membership on a Advisory Committee will be at the discretion of the Chair of that committee.

IMCS will also convene a Family School Association to further involve our school's families in governing the school. IMCS recognizes that its students may come from non-traditional families, and that other members of the children's families or legal guardians may assume parental roles. For this reason, IMCS will talk about family involvement rather than parental involvement, and will create the Family School Association (FSA) in place of a traditional PTA.

Parents and families will have the opportunity to participate in school governance in several ways. The FSA will provide a forum to support discussion of parents' and families' concerns, proposals and suggestions for school support, school improvement and problem solving. Subcommittees will be named to plan and carry out specific projects to support the school, such as family outreach projects and fundraising.

At least one seat on the Board will be reserved for a parent of a child enrolled in the school, as an ex-officio, non-voting trustee. This parent will be elected by the vote of the FSA and his/her term of office will be one year. Families will be encouraged to attend Board meetings.

IMCS will promote community participation by making board meetings open to the public and announcing the date, time, and location of board meetings through local media, as well as posting a schedule of board meetings on the school's Web site and Facebook page. The board seeks to be comprised of community members who represent a diverse set of skills and expertise to ensure our board and school community are representative of our local community. IMCS also seeks to forge partnerships with local nonprofit organizations, such as Pleasure Island Sea Turtle Project, NC Aquarium at Fort Fisher, Surfrider Foundation, Nourish NCI, as well as other community-service oriented organizations to strengthen the school's mission to foster communal responsibility in our students.

IMCS will also promote staff participation in school governance by creating and maintaining a work climate that is friendly and supportive, in order to encourage staff contributions to discussions of academic issues. Through regular meetings with the Head of School and the Academic Advisory Committee, teachers will be able to raise issues, discuss and reach agreements on priorities, plan ways to resolve problems, make suggestions, propose projects and assume responsibilities for carrying them out. Staff will also participate in school governance through membership of the FSA. IMCS will elect at least one teacher to represent it in the FSA and key staff will attend the monthly meetings.

The Head of School will represent the school at Board meetings, providing key insights on school operations and representing the needs of staff to the Board where necessary.

Training on charter school governance will be offered to incoming Board members, Advisory Committee members, FSA members, and school families in an effort that all involved may provide effective stewardship as board members or as more general members of the school community.

*8. Describe the organization's performance-based goals and measurable objectives for the charter school. Organizational goals and measurable objectives should describe and measure the effectiveness and viability of the organization:*

### Academic Goals

Goal #1: By the end of 2016, the percentage of students in grades 3 through 8 enrolled in their second year who will meet or exceed student proficiency levels in reading and math as demonstrated on the End-of-Grade assessment will be 5% above the state's average.

Strategies: Maintain consistent and thorough implementation of Montessori theory and pedagogy; Hire highly qualified and experienced instructors; Evaluate academic achievement against normative and criterion measures (test scores + progress reports) and adjust curriculum where necessary.

Measures: Normative assessments; Student progress reports; Teacher observations; and EOG scores

Goal #2: At the completion of each school year, all students at Island Montessori Charter School will demonstrate visible and measurable annual growth goals.

Strategies: Teachers will establish baseline data at the beginning of each school year for each student; Teachers will adhere to the Montessori Method and maintain a prepared environment that has within it the following areas for learning: Language, Math, Geometry, Science, Sensorial, and Practical Life; Teachers use daily observations to ensure all students are acquiring mastery of essential skills and adjust curriculum or provide interventions as needed.

Measure: Formative and summative assessments; Teacher observations; Student work samples; Portfolios

Goal #3: By the completion of each school year, 100% of our students will willingly and regularly contribute to the community as part of our core curriculum, and each student will complete at least one service learning or community service project.

Strategies: Plan at least three field trips a year as well as regular excursions into the community to visit local elder centers, children's hospitals, and other service-oriented businesses to foster a strong sense of community as well as to further students' academic studies; Forge partnerships with community members and local organizations, such as Pleasure Island Sea Turtle Project, NC Aquarium at Fort Fisher, Carolina Beach State Park, Katie B. Hines Senior Center, etc.; Incorporate environmental education and community service lessons into the Montessori curriculum.

Goal #4: By the completion of each school year, all students will demonstrate increasing levels of respect for self and others, concentration, self-motivation, self-reliance, compassion, and discipline.

Strategies: All classrooms will be well-ordered, thoughtfully prepared Montessori environments equipped with high-quality Montessori materials; Teachers will maintain uninterrupted, two- to three-hour morning work cycles to ensure students are free to concentrate on their lessons and are acquiring the traits of a normalized (refer to Montessori Glossary in Appendices) Montessori student.

Measures: Teacher, faculty, and parent observations; Discipline Data

#### Non-academic Goals

Financial sustainability: School operations are routine and efficient, providing the necessary means for community members inside and outside the school to be able to accurately evaluate the operation of the school.

Strategies: Develop routine policies and procedures that support the mission of the school; establish strong financial management and reporting procedures; create a Development Plan based on the daily operational needs of the school and future strategic goals.

Measures: Body of documented school policies and procedures; Board of Directors Meeting Notes and Reports; Annual Fiscal Audit; Membership of the Board of Directors; Annual Parent Survey; and documented Development Plan.

High levels of parental involvement: IMCS will seek high levels of parent volunteering and provide numerous opportunities for parents to participate in the school, both in and out of the classroom. Annual measurable goal: at least 75% of parents with students enrolled in IMCS will participate in at least one "social" activity (i.e., monthly coffee or parent education night) and one volunteer activity (i.e., serve on the Family School Association or a Advisory Committee and/or provide feedback on the school's annual report).

High levels of parental satisfaction: Annual parent satisfaction surveys will be distributed to parents/guardians at the school. These surveys will not only provide valuable feedback for the administrator and staff of IMCS regarding parent satisfaction, but will also be utilized in determining ways to improve, support, and advance the growth of the school. Annual measurable goals: at least 75% of parents will participate in the parent survey, and at least 80% of parents surveyed will indicate that they are "satisfied" or "highly satisfied" with the quality of education their child(ren) receive(s) at IMCS.

Active community partnerships: IMCS will proactively pursue relationships with community organizations, particularly those that serve underprivileged families, are community-service oriented, and/or have an environmental focus. Annual measurable goal: 5 active partnerships with community organizations.

Professional Development: IMCS will provide professional development for staff to prepare for the opening of 2013/14 school year, and provide ongoing professional development to prepare for the addition of upper elementary classrooms. IMCS's professional development will focus on training staff regarding curriculum and programs that meet both NC Standards and the Montessori Elementary programming as measured by participation in internal and external workshops. Annual measurable goal: the school develops and implements either a school-wide or individual employee staff development plan that has clearly defined goals and objectives, is reflective of the school mission, and applicable to each employee's job; and all staff participate in professional development.

Montessori Accreditation: IMCS will earn accreditation from the American Montessori Society (AMS) by the end of 2014. IMCS will maintain consistent and thorough implementation of Montessori theory and pedagogy, and all classrooms will be well-ordered, thoughtfully prepared Montessori environments equipped with high-quality Montessori materials. All of the school's lead teachers will be Montessori certified or will be enrolled in an accredited Montessori teacher training program and will earn their Montessori certification within two years of starting the training program.

*8. Describe how the governing board will ensure that current and future board members avoid conflicts of interest:*

The responsibility of the Board members is, first and foremost, the well-being, success, and integrity of the school as a whole. This responsibility MUST come before personal interests and opinions, interests as a parent of a student of the school, business relations, political interests, employment, and loyalties to any other board or special interest group. This responsibility must be communicated to any individual willing to run for a Board position, and, upon accepting a seat, must sign a commitment of understanding and allegiance that will include the following information:

Board members with a potential conflict of interest have the responsibility to advise the Board as a whole of said conflict and then recuse him- or herself from any discussions or voting with regard to that matter.

Board members may not participate in any business or personal dealings with the school unless the potential conflict of interest has been communicated openly to the board, and withstands all policies in regards to proprietary information, competitive bidding, and confidential information. Decisions about any such matters will, as abiding by the bylaws, be made only with a quorum (not counting the interested Board member) and all voting will occur without Board member present. The remaining Board members have the right to ask the interested Board member to leave the room during discussion regarding business in which a conflict of interest may exist.

Violations of the Conflict of Interest Policy may result in expulsion from the Board.

**E. ADMISSIONS POLICY (G.S.115C-238.29B(b)(4); G.S. 115C-238.29F(d)(1))**

*Provide a description of the policies and the procedures for admitting students to the proposed charter school, including specific details of the enrollment lottery plan, statutorily allowed preferences, a plan to develop clear procedures for withdrawals and transfers, as well as subsequent marketing strategies to reach all demographic groups.*

The school will comply with all applicable federal and state laws related to admissions and enrollment.

**Non-Discrimination**

Island Montessori Charter School will not discriminate on the basis of intellectual abilities, measures of achievement or aptitude, prior Montessori experience/education, disability, status as a handicapped person, homeless status, English proficiency, religion, creed, race, sex, color, national origin or any other basis that would be illegal for an existing school district. Tuition or admission fees shall not be charged to any student.

**Application Period**

Applications for prospective students will be distributed at scheduled parent meetings. These meetings will be announced and advertised in the Wilmington Star News, the Island Gazette, on a sign outside of the school, and on our website. Completed applications must be returned to the

school office on or before 4:00 p.m. of the designated deadline, *or, if mailed, they must be postmarked on or before that date to be included in the lottery.* Parents need not be present at the lottery, but are welcome to attend.

### Application Procedures

Interested parties may obtain applications at the school office or by attending a Parent Information Session.

Applications will be mailed, faxed, or emailed to anyone requesting an application by telephone or email. Applications for the subsequent school year are received during the Open Enrollment Period. If applications received exceed offered seats in any grade level, a random selection process will take place. If applications received are fewer than offered seats in each and every grade level, all eligible applicants will be accepted and a random selection process will not be conducted. All applications received after the Open Enrollment Period will not be eligible to participate in the random selection process, and will be added to the end of the accepted list if offered seats are still available after the random selection process, or to the resulting waiting list created at the time of the random selection process.

Accepted applicants must confirm their intent to attend the school by submitting an Admissions Form and an Official Release of Records Form by a deadline designated by the Board. The school will send letters to parents reminding them of this obligation in order to enroll their child. The school will send all applicants a postcard to inform parents that if the student does not attend the first day of school or call in to request an excused absence by the date and time indicated, the student will forfeit his/her registered status in the school and will not be enrolled. The school will attempt to call all applicants who have not responded to inquire whether the applicant is still planning to attend.

Once students are enrolled and remain enrolled, they will remain eligible to be re-enrolled at the school for successive years without having to reenter the random selection process. However, they will be requested to complete a re-enrollment form by the end of the Open Enrollment Period showing intent to re-enroll for the subsequent school year. All applicants on a waiting list must resubmit an application for the following school year during the next Open Enrollment Period.

### Random Selection Process

The random selection process shall be open to the public, and the school will notify all applicants of the time and place. Names will be randomly selected until all offered seats have been filled. Any remaining names will be randomly selected to establish waiting list priority used to fill any open seats that should become open prior to and up to the 20<sup>th</sup> day of school for the school year the student applied. After all eligible names have been randomly selected, the school will add the names of applicants who submitted applications after the Open Enrollment Period in the order in which they were received. The random selection process will be videotaped. In the event of any discrepancy, the videotape will be the official record of placement of students.



## Class Size and Offered Seats

The Board will approve class size and offered seats after receiving a recommendation from the Executive and Academic Advisory Committees.

## Enrollment Procedures

Enrollment preference is first given to currently enrolled students. Next preference is given to the following ordered categories of applicants:

- In the first year of the school's operation, children of the initial members of the school's Board, so long as (i) these children are limited to no more than ten percent (10%) of the school's total enrollment or to 20 students, whichever is less;
- Children of the school's Head of School, teachers, and teacher assistants;
- Siblings of currently enrolled students who were admitted to the school in a previous year;
- All remaining applicants

If multiple birth siblings apply, one surname will be entered into the random selection process to represent all of the multiple birth siblings.

## Procedural Steps

During the month of January, IMCS will conduct Parent Information Sessions, which give parents the opportunity to tour the school, meet the faculty, and learn about our school. Applications for the upcoming school year are distributed at the close of each meeting. Staff members will have parents write their name, and the name(s) of their child(ren) on a log sheet as applications are given out.

Lottery numbers are assigned to each application, starting with "1" (siblings receive the same number). A staff member will write in the lottery number on the application before giving it to the parent. The deadline for application submission is the last school day in January. If mailed, the application must be postmarked no later than the last school day in January. The school will hold its lottery before the end of February, allowing teachers to have time to assess home-schooled applicants to determine proper grade placement for the lottery. Teachers are asked if spots for possible retentions need to be held. The front office staff will determine the number of students rising to the next grade level, plus sibling placement. Available spots in each grade are determined with this data. At this point, charts are prepared detailing class enrollment number, number of rising students filling spots, number of held spots, and number of spots going to siblings.

All applications, once received, are reviewed by the front office staff for necessary info, i.e., parent signatures, address and telephone numbers. The applications are placed alphabetically, by grade, into 3 ring binders and held in the front office. After the application deadline, lottery cards are prepared with the lottery number and grade(s). Typed lists with applicants' names and lottery numbers are placed in front of each binder. Copies of these lists will be used to record the presence of parents at the lottery. Parents who attend will be given a note or card with their child

(ren)'s lottery number. Copies will also be used by the lottery helpers to record whether the child is "IN" or on the wait list as numbers are called. One staff member draws the cards out of a box, announces the number and the grade (or grades if there are siblings); four staff members will record the results on the lottery lists. One staff member will mark the large charts, which are attached to the back wall of the multi-purpose room. The charts are used so that parents in attendance can watch the process. We will strive to have a total of seven staff members available during the lottery process: one to sit at the sign-in table for parents as they come in, one to draw numbers, four to record results on lists, and one to mark wall charts.

After the lottery, applications are rearranged by status in the binders. In order to avoid multiple calls to the same families, the status of siblings is recorded on one application so that one call can be placed. Staff members place calls to all applicants informing them of the results.

## Enrollment

Once a student has been admitted to Island Montessori Charter School, formal enrollment is required to reserve the student's space in the school. Enrollment will take place during the month of March. The enrollment procedure will ensure that the school has information necessary to acquire student records, which are needed to meet State Board of Education records requirements for charter schools. This information includes birth certificate, immunization record, and transfer records from previous schools (public, private or home schools) including test scores, IEP/504 records and behavioral records. *These records are not needed during the enrollment period, but we must receive the enrollment form to reserve the space. All kindergarten enrollment forms must have a copy of the birth certificate attached.* A student who has been admitted but who is not enrolled by the end of March will be removed from the list. Waiting lists will be maintained from the time of the lottery through the 20<sup>th</sup> day of school of the upcoming year. If and when an opening in any grade should occur, the next child on the wait list will be called. After the enrollment deadline, parents have 48 hours in which to enroll from the time the offer is extended. If enrollment does not take place within this time frame, the application will be withdrawn. No new students will be admitted after the 20<sup>th</sup> day of school.

### III. EDUCATION PLAN

NOTE: *Answer all sections completely, include your answers in this section of the application, do not include as an appendices. Do not use "same as LEA" or "whatever the law says". The State Board of Education shall give priority consideration to the applicants who demonstrate potential for significant, meaningful innovation in education. Give explanations. Lack of proper documentation will jeopardize the application review.*

#### **A. INSTRUCTIONAL PROGRAM**

*Provide a detailed description of the overall instructional program, including the following:*

##### *1. Educational theory, foundation of the model, and proposed innovative offerings.*

Island Montessori Charter School will educate its students by using the Montessori Method of instruction. This method has been employed in schools throughout the world for over 100 years and has been well established, studied and supported by educational research. Montessori education is based on the lifetime of observation, work, lectures, and writing by Dr. Maria Montessori, who also developed didactic materials and established teacher training courses worldwide. The Montessori program provides a series of planned learning environments, materials, and lessons uniquely suited to the developmental characteristics of children at different stages of childhood.

The framework for the Montessori educational program is "The Five Great Lessons," a series of five stories that introduce the academic disciplines and evoke curiosity and interest in the children. The children "follow up" on the Great Lessons and other stories with their own research. Research is a major aspect of the elementary and adolescent Montessori classrooms. It serves as a means for students to follow their interests, share their learning and collaborate with one another. At the conclusion of their research, students may demonstrate their knowledge of the subject in a variety of ways, including written and oral reports, visual displays, theatric presentations, art or music, creative writing, and special projects.

The Montessori pedagogy is comprehensive. The core curriculum is interrelated showing the "big picture" of how math, science, language, music, geometry, history and art all work together. The principles form a foundation for motivated learning and high achievement. The model meets the child's social, emotional and academic needs. Montessori philosophy helps a child build his self-esteem, allowing him to be independent and take ownership of his academic success. Montessori research shows that each individual has an inborn set of needs (to work, explore, complete a task and create). The drive to fulfill these needs helps people to better themselves. When a child is allowed these needs freely and guided to hone them, a fuller, more balanced human being is allowed to emerge. Montessori education concentrates on developing traditional academic skills as well as overall personal skills and abilities. Montessori students are encouraged to develop initiative, to become resourceful, to gain problem solving skills and to build better personal and social relationships. Their awareness is also directed toward respect for others and

the environment. Montessori education aims to produce graduates that are peaceful, respectful, and productive community members.

Montessori education is, by definition, innovative. The pedagogy is based on Montessori's highly original and innovative concepts for curriculum materials, child-sized furniture, classroom layout, mixed-age grouping, and teaching strategies. Montessori originally developed her materials and style of teaching to help special needs students achieve grade levels in reading math. She later discovered that even young children benefited from her unique materials and teaching methods and were capable of approaching big, abstract topics such as earth's geography through sensorial exploration and guided instruction of knowledge.

The following principles are hallmarks of the best Montessori schools and are the basis of programs at Island Montessori Charter School:

Principle 1: Movement and cognition are closely intertwined and that physical movement can enhance thinking and learning.

Principle 2: Choice and perceived control promote children's concentration and contentment in the learning process.

Principle 3: Personal interest enhances learning in a context where interests are build on prior knowledge and the children's own questions.

Principle 4: Extrinsic rewards negatively impact long-term motivation and learning.

Principle 5: Collaborative (child-child) arrangements are conducive to learning.

Principle 6: Learning situated in and connected to meaningful contexts is more effective than learning in abstracted contexts.

Principle 7: Sensitive and responsive (nurturing) teaching is associated with more optimal outcomes.

Principle 8: Order in the environment promotes and establishes mental order and is beneficial to the child. This principle addresses four types of order: temporal, spatial, noise/crowding, and orderly education of the senses. To support this principle, Montessori classrooms must be very orderly and prepared with respect to their spatial arrangement and their organized use of materials.

The curriculum and teaching methods of Island Montessori Charter School align with the general social needs of its target population first through multi-age grouping, which offers an inclusive environment where peer tutoring, peer-teaching, and collaboration are encouraged in order to develop social skills and develop a caring community of learners. Furthermore, all children will receive explicit instruction in social skills, emotional management and peaceful conflict resolution throughout the year.

*2. Teaching approach, class structure, curriculum design, courses of study, sample daily schedule, pillars of the school culture, and instructional methodology that align with the school's mission.*

### The Montessori Classroom

**The Prepared Environment:** Dr. Montessori believed that a prepared environment was crucial to facilitating independent learning and exploration by the child. In the elementary prepared environment, a combination of freedom and responsibility guide the children in making appropriate choices of activities.

Montessori classrooms are carefully designed and set up to allow the students to be highly engaged and active participants. The classrooms are child-centered and well organized, so that students can easily find the materials they need to work independently. Classrooms are arranged to include the following learning areas: Language, Math, Geography and Science, Sensorial, Practical Life, and Art. Lessons in each learning area are arranged in sequential order from simple to the complex, from the concrete to the abstract, and from precept to concept.

Montessori believed that order in the environment promotes and establishes mental order and is beneficial to the child. To support this Montessori principle, Montessori classrooms must be very orderly and prepared with respect to their spatial arrangement and their organized use of materials. Classrooms should not be cluttered or heavily decorated; rather, the environment must be thoughtfully prepared to be inviting and calming. There are few items on the walls; only a small selection of student work and exhibits that are relevant to the work are displayed, such as maps or artwork. The environment does not compete for the students' attention, but allows them to focus on the materials and their work, rather than decorations on the walls.

**Specially designed materials:** A Montessori classroom is filled with specially designed learning materials. An important Montessori tenet is: "The way to the brain is through the hands." Maria Montessori believed that students must interact with real objects in order to internalize appropriate mental representations of concepts. Therefore, the Montessori approach is based on a wide range of specially designed concrete materials that physically model the structures of abstract concepts, particularly in math and language arts.

Again, Maria Montessori believed that children learn best by doing. So, she designed materials that are colorful, appealing, sequential, and positioned on open shelves for the child to choose. The Montessori materials are grouped together by subject and arranged in sequence from concrete to abstract. Lessons are given in small groups and other children who are interested may join as they wish. The materials, along with impressionist charts and demonstrations, are tools used by the teacher to guide the child into logical thought and discovery. Each material has a concrete presentation that leads to an abstract idea.

Each material also has multiple extensions that offer higher levels of challenge as the children develop.

**Multi-age classes:** Another key distinction of Montessori classrooms is that they are multi-aged. Maria Montessori identified age-specific periods of development in children known as "planes of development." Each plane of development contains unique characteristics and tendencies. At every level, classroom environments are designed to serve the students' plane of development.

Elementary students age 6-12 are in the second plane of development. In the Montessori curriculum, these students are further separated into sub-planes consisting of 6-9 year olds (lower elementary) and 9-12 year olds (upper elementary). Students aged 12-15 (adolescence) are in the beginning stage of the third plane of development. Therefore, Island Montessori Charter School will combine the above-mentioned age groups into distinct, age-blended classrooms of grades 1-3, 4-6 and 7-8. Students will remain in the same classroom for the duration of the three-year cycle. Note: Kindergarten is part of the Primary classroom, located in the Montessori "Children's House," which serves children 3-6 years of age.

Multi-age classrooms maximize curriculum options available, encourage cooperation and minimize competition, provide opportunities for indirect learning for younger students, foster self-confidence in older students who serve as role models, and provide for long-term teacher/student relationships. Multi-aged classes allow children to work at their own pace at different levels of academic progress. Because the classrooms are multi-age, peer learning and mentoring opportunities are encouraged, developing community through collaboration.

Independence and the freedom and ability to make choices: In a Montessori classroom, the teacher provides freedom within limits. This contributes to creating an educational climate where students feel their ideas and needs are respected. At the beginning of the school year, the teacher is more involved in planning the students' schedules (especially newly enrolled students). As ongoing assessments indicate that students have gained more skills, they have more opportunities to make choices, within the established limits, and are able to plan more of their work. Since students are held accountable for their learning, they reflect upon the consequences of these choices and plan accordingly. Thus, they become responsible for their own learning.

Time and practice to achieve mastery: The amount of repetition and the time needed for processing information and skills vary according to the child, skill, and topic. In order for successful learning to occur and for students to meet achievement goals, every opportunity is given for them to have sufficient time to master skills and reach understanding of a concept or topic. A daily schedule with long blocks of time for students to work independently using sequenced classroom materials allows for increased time-on-task and leads to enhanced skills and greater opportunities for applying knowledge. Long blocks of time also help students learn how to concentrate, develop patience and perseverance, and experience success more often.

Peer modeling and scaffolding: Peer modeling and teacher scaffolding are important and effective instructional strategies. In the multi-age Montessori classrooms, peer modeling occurs frequently since students are free to work together and encouraged to help one another. This also supports the development of a friendly classroom climate where students feel accepted and valued. Teacher scaffolding is also inherent in the Montessori approach since most of the specially designed Montessori materials are carefully sequenced, allowing for gradual reduction of support, and students are gradually given more and more autonomy in making decisions on how they will approach learning tasks.

The Five Great Lessons: Montessori education is a hands-on, student-focused method of instruction based on The Five Great Lessons, which include *The Story of the Universe*, *The Story of Life*, *The Story of Humans*, *The Story of Language*, and *The Story of Signs and Symbols*. Each lesson is taught each year in Montessori elementary classrooms. Each lesson, or story, acts as a catalyst for further research and study throughout the subject areas. These stories span broad historical frames of space and time. Through these stories flow the details of the disciplines of social studies, language, science, and math. The stories provide an overview and the child then investigates each discipline in detail. Due to the unifying framework of the Great Lessons, knowledge is intertwined. Subjects are not taught in isolation but are connected to one another. The stories build a sense of the importance of each person to make a contribution to the continuing stream of human progress, laying the foundation for life commitments. The Great Lessons are taught as stories, which encourage the children to think and wonder, and are a springboard from which children can launch individual study.

- *The Story of the Creation of the Universe* tells of the ancient roots of the cosmos, and leads to lessons and explorations in physics, astronomy, geology, and chemistry. For example, children learn about light, heat, convection currents, gravity, galaxies, planetary systems, the earth's crust, volcanoes, erosion, climate, and physical geography.
- *The Story of Life* traces the history of life on earth from one-celled animals and plants to complex human beings, which is the basis of lessons in chemistry, nutrition, metabolism, photosynthesis, cell structure, categories of animals and plants, the care and requirements of different animals, and their interdependence within an ecological system. Children are presented the formal scientific language of zoology, botany, anthropology, etc., which exposes them to the accurate, organized information of the life sciences.
- *The Story of the Humans* is the basis of lessons in prehistory and the emergence of ancient civilizations. In the Needs of People lesson, children are given an analytical tool to compare one culture with another. Needs of People include food, water, shelter, fuel, transportation, communication, religion, art, music, and entertainment. Children learn how climate and topography influence culture and political geography. For upper elementary students especially, *The Story of Humans* will launch more extensive forays into history.
- *The Story of Language* is the basis of children's learning the origin, structure, and types of writing and speaking. Montessori's unique grammar materials give the children an analytical tool to examine how language is put together. The mechanics of capitalization and punctuation are refined. Origins of English words from other languages, the meanings of suffixes and prefixes, spelling, and the different forms of writing, such as poetry, narrative, and plays are learned. Children keep daily journals of their work as both a writing exercise and an evaluation of the significance of the lessons they learned that day.
- *The Story of Signs and Symbols* is the basis of children's learning about mathematics. The mathematics curriculum is presented with concrete materials that simultaneously reveal arithmetic, geometry, and algebraic correlations. Math is integrated into all of the Great Story themes, such as the need for large numbers in measuring time and space in astronomy, the need

for negative numbers when measuring temperature changes, or the need for triangulation to reestablish property boundaries after the Nile flooded ancient Egypt. Elementary children are driven by an innate curiosity directed at their community, their culture, and ultimately, the universe. They stretch their minds to imagine the big and the ancient to their extreme, but their curiosity extends beyond just seeking facts to searching for the “why” and “how” in just about everything. Their explorations are aided by newly developed powers of reason and unlimited imagination, characteristics of the elementary aged child.

### Courses of Study

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**Math:** Math is often the most recognized and familiar work subject in the Montessori setting. Math includes, but is not limited to, number formation and identification, calculation of all four processes, prime numbers, multiples and factors, absolute value, commutative, associative and distributive properties, factoring, graphing, statistics and probability, application processes such as time, money and measurement, fractions, percentages and decimal work, number cubing, square root, cube root, word problems and logic.

The Common Core State and NC Essential Standards for Mathematical Practice align seamlessly into the Montessori math curriculum. The Montessori math curriculum meets the following Standards for Mathematical Practice:

- Make sense of problems and persevere in solving them.
- Reason abstractly and quantitatively.
- Construct viable arguments and critique the reasoning of others.
- Model with mathematics.
- Use appropriate tools strategically.
- Attend to precision.
- Look for and make use of structure.
- Look for and express regularity in repeated reasoning.

While the Montessori math curriculum is extensive, its real value exists in the way it is presented. Using sequential related attractive material, the lessons progress from absolute concrete to true mental calculation. For example, number work is presented using small gold beads with one-to-one correlation. Single unit beads are one, ten fused beads form a line and are ten, ten bars are connected to form one hundred square, and finally ten hundred squares are fused to form one thousand cube.

As the student progresses, the golden beads are replaced for representative, color-coded tiles. The unit bead is replaced with a green tile with the number 1 on it. The ten bar is replaced with a single blue tile with number 10 on it. The hundred square is replaced with a red tile with 100 on it. The one thousand cube is replaced with a green (the color that represents one, for one thousand) tile with 1000 on it. Thus actual value is replaced with representations. Throughout the Montessori math materials, these colors will represent their specific place value. As the student continues to advance through the curriculum, material becomes increasingly abstract and visual and physical cues are removed.



One of the most effective aspects of the Montessori math material is its self-correcting design and its ability to produce student-led discoveries. For example, in the initial addition of common denominator fraction lesson, the students use fraction insets to uncover the rule for addition of like fractions. The student works with the material to find that when one puts together one fourth and one fourth, the answer is two fourths. Similarly, when one combines three eighths with two eighths, the answer is five eighths. Before long, the student composes the rule that “when one adds fractions with the same denominator, one adds the top number and the bottom number stays the same.” With that, the student has eliminated his need for the material.

The formal math curriculum begins with activities that teach sequence, recognition and quantity of numbers 1-10. Two parallel formats build on this knowledge with numbers (addition, subtraction, multiplication and division) and memorization of mathematical facts; used together, these two disciplines form the foundation for working with complex math problems. Other lessons introduce math concepts and skills, such as: counting –by-multiples, the squares and cubes of numbers 1-10, and fractions. The red rods teach the concept of comparative length. Through basic laying out of the rods, the child learns at the most basic concrete level how the numbers 1-10 relate to each other, the concept of one to one correspondence, and the memorization of the 1-10 sequence. A child needs to have an understanding of 1-10 to work with the decimal system. The Golden beads are used to teach the decimal system. One bead is a unit and represents the quantity of one. Ten golden beads threaded together on a wire are referred to as ten. Tens wired together into a square are named one-hundred. One hundreds wired together into a cube are named one-thousand. During an initial lesson a variety of games familiarizes the child with the names of these four categories and matching bead quantity. The golden beads allow the child to see and feel the quantities from one to a thousand to understand for the first time on a basic level, the concept of squaring and cubing of numbers. Formation of Complex Numbers and Beads and Cards enables the child to change ten of one category into one of the next higher category. Hands on counting beads quantities illustrates that ten units equal one ten and ten tens equal one one hundred and so on. Now the child is ready to learn the four operations of addition, subtraction, multiplication and division.

Geometry: Using a variety of hands-on manipulatives, the Montessori geometry material offers students the opportunity to use concrete experiences to discover abstract concepts. Similar to Montessori’s math lessons, geometry work is often sequential, with materials that are proportionally related to one another.

Complicated concepts are initially presented as simple experiences, enabling the students to gradually progress to increasingly difficult work.

Geometry work includes the formation, manipulation, identification and classification of shapes, angles and lines, calculations of angles, properties of polygons, properties of solids, surface and volume, 7 triangles of reality, symmetry, similarity, congruency, equivalency, advanced circle study, geometry terms and nomenclature, circumference, area, and perimeter. Some lessons are presented by introducing students to geometric concepts; however many lessons allow students the opportunity to discover the concept themselves through use of the material.

Language: Language in the Montessori curriculum is an intense and active study. It includes, but is not limited to, formal spelling and reading lessons utilizing phonetic and whole language

studies, word etymology, reading comprehension, literature studies, parts of speech, sentence analysis, creative writing, and foreign language studies. In the Montessori classroom, students have the opportunity to apply language to any area of the curriculum. This is done by using information cards in most subject areas, giving the students the freedom to express their learning and ideas in written form, keeping a daily journal of their work, and language activities.

Furthermore, focused grammar studies, such as the parts of speech and sentence analysis allows the student to identify, construct and deconstruct logical sentences and thoughts. Montessori takes often-confusing concepts such as sentence object, indirect object, predicate and adverbial extension and presents them in a logical, sequential way. By first exposing the student to concepts, rather than terms, Montessori allows the student to understand the process. This "process over product" mentality places the emphasis on learning.

One of the most unique aspects of Montessori is its emphasis on the etymology of words. Whenever possible, students are given the origin and meaning of new terms. Words such as polygon are presented as poly = many and gonia = angles. The subsequent lesson would follow, "Polygon comes from the Greek words of many and angles. In fact, if we look back even further, we find that the original term was gonu, which meant knee. That word came to mean angle. Why do you think the same word they used for knee could be used for angle?" (Teacher bends his/her knee at an obvious angle.) "When we are talking about a closed figure, we can identify it based on the number of angles it has. So when we are talking about polygons, we are talking about any shape with a certain number of angles. Let's begin with one that may sound familiar to you. This shape is a pentagon. It comes from the Greek word pente, meaning five. Maybe you have heard of the government building called The Pentagon. Why do you think it is called that?" The lesson would continue with similar discussions involving the etymology of other polygons. By creating a meaningful connection between the language and the shape of an object, the teacher enables the student to have a deeper understanding of both.

The Common Core State Standards for English Language Arts & Literacy align seamlessly into the Montessori Language curriculum. The Montessori Language curriculum meets the following Standards for Reading:

#### Key Ideas and Details

- Read closely to determine what the text says explicitly and to make logical inferences from it; cite specific textual evidence when writing or speaking to support conclusions drawn from the text.
- Determine central ideas or themes of a text and analyze their development; summarize the key supporting details and ideas.
- Analyze how and why individuals, events, and ideas develop and interact over the course of a text.

#### Craft and Structure

- Interpret words and phrases as they are used in a text, including determining technical, connotative, and figurative meanings, and analyze how specific word choices shape meaning or tone.

- Analyze the structure of texts, including how specific sentences, paragraphs, and larger portions of the text (e.g., a section, chapter, scene, stanza) relate to each other and the whole.
- Assess how point of view or purpose shapes the content and style of a text.

#### Integration of Knowledge and Ideas

- Integrate and evaluate content presented in diverse media and formats, including visually and quantitatively, as well as in words.
- Delineate and evaluate the argument and specific claims in a text, including the validity of the reasoning as well as the relevance and sufficiency of the evidence.
- Analyze how two or more texts address similar themes or topics in order to build knowledge or to compare the approaches the authors take.

#### Range of Reading and Level of Text Complexity

- Read and comprehend complex literary and informational texts independently and proficiently.

Science: Science is incorporated into many different subject areas throughout the Montessori classroom. It is comprised of hands-on experimentation using the scientific method, earth and sun lessons, research and classification, properties of solids, liquids and gases, properties of metals, properties of light, properties of magnetism, work of air lessons, and work of water lessons.

By incorporating science into other subject areas, Montessori highlights science's practical applications. For example, when presented with *The Story of the Universe*, students are exposed to the physical laws of nature, such as heat expansion and properties of liquids. These scientific properties are demonstrated to the students during the lesson and then arranged as experiments for students to do in the classroom. Experiment cards are available for the students. On these cards, there is a list of equipment needed for the experiment and the procedure to follow. Students gather materials to perform the experiment from different areas of the classroom. The student then writes the procedure and purpose of the experiment and what he expects will happen after the experiment is performed (hypothesis.) After conducting the experiment, the student records the results and either validates or negates his prediction. If the result differs from what was expected, the student then provides a possible explanation for the difference.

Foreign Language: As with other subject areas, second language study in the Montessori classroom is incorporated into the rest of the curriculum. Also, Montessori's study of etymology allows students to discover similarities in many different languages. IMCS will incorporate a dual-language (English/Spanish) aspect to the classroom by seeking classroom assistants who will use only Spanish instruction. This will develop the students' vocabulary and knowledge of and comfort with the Spanish language, while at the same time facilitate the learning of the second language learner population. All students will participate in daily group Spanish language lessons, which will incorporate songs, movement, stories, and interactive games. Spanish books and Spanish Montessori materials will be on the shelf in every classroom for students to use in their discretionary time and to receive individual Spanish language lessons.

**Geography:** Students study geography in a variety of ways in the Montessori classroom. It includes, but is not limited to, land and water form studies, formation of the earth and other planets, state and continent studies, and work of rivers. Students become proficient, not only in their knowledge of the physical attributes of other countries, such as ecosystems and land and water forms, but also learn about the civilizations that reside in various regions. Furthermore, students learn how different cultures are influenced by their natural resources and conversely, how different cultures affect their natural environment. Students learn what distinguishes one continent from another. They follow the history of the changing landmasses and realize the impact that has had on plant and animal life.

The work of rivers is a series of lessons that illustrates the constant reconfiguration of the earth's crust. In these lessons, students are inspired to learn about the impact of water on land. They study major rivers of the past and the civilizations that grew around them. They expand on these lessons by building working river models, conducting experiments and visiting rivers in their community.

Students also study landforms, such as in the work of parts of a mountain. In this work, students begin by learning the nomenclature of a mountain. The work then expands to studying the formations of different mountains. They research major mountain ranges across the world, discovering the impact that these landforms have on the development of cultural identity. Thus, as with other areas in the Montessori curriculum, geography is presented in a holistic manner.

**Geology:** Montessori's study of geology is evident throughout the subject areas. It includes, but is not limited to, rock identification and classification, geological formation of land and water forms, volcano studies, and mineral studies. Beginning with the story of the universe, students are unknowingly learning about the geological properties and make-up of the earth. By learning about such scientific principles as hot things rise and cool things sink, students discover that heavier elements and minerals often reside under lighter ones. Moreover, in studying the changing climate of the earth, students understand why ancient sea fossils can now be discovered in deserts.

**Botany:** Botany, in the Montessori classroom is an engaging, active study of plants. It includes, but is not limited to, parts of the plant, functions of plants, plant identification and classification, life cycle of the plant, animal and plant interdependency studies, and plant needs. Students are often given lessons outside if possible, in the presence of what is being studied. Students are encouraged to examine actual specimens and learn from real life examples. Moreover, by studying the properties of plants, students quickly appreciate the contribution and effect that plant life has on mankind and the dependency that exists between the two.

**Technology:** Maria Montessori believed that students should be able to navigate the technology of their time. As with other subjects, technology will be integrated throughout the curriculum. Research, writing, typing and critical thinking skills are some of the examples of how technology will complement student studies. As students get older, they will have more in-depth studies of computer applications, such as how to navigate search engines, how to incorporate technology into presentations, how to critically consider information gained from the Internet and how to research resources. Additionally, students will have the opportunity to investigate future

technological advances through research and community outreach. As IMCS grows, it will develop a Technology planning committee and design a Technology School Improvement Plan.

**Biology:** In biology, students have the opportunity to learn about life in its many forms. This includes, but is not limited to, parts of animals, animal identification and classification, studies of the five kingdoms, vertebrate/invertebrate work, animal and human needs, life cycle work, and body functions. It is an extensive and popular area of study for students. Much like botany, students often receive introductory lessons in the presence of actual specimens. For example, the introductory lesson to the parts of the fish call for the presence of a fish. Again, as in botany, student discussion leads into a detailed study of the parts of the fish. As students progress in the curriculum, they are exposed to more in-depth studies of animal characteristics. In the Function of Fish lessons, students study the respiratory, circulatory, support, movement, defense and reproduction systems of the animal. By studying the identifying characteristic and traits of fish, students are able to apply their existing knowledge to unknown animals, leading naturally into the studies on animal and kingdom classification.

**History:** Historic studies are a major component of the Montessori curriculum. It is by studying history that students learn of the interdependencies of humans. This dependency is tied to one another, our environment and nature. History is woven throughout the Montessori curriculum. This includes, but is not limited to the five great Montessori lessons of creation of the universe, the story of life, story of humans, story of writing and story of numbers. Additionally, in history, students will study fundamental human needs, the timeline of life, history of geometry, culture studies, music history and appreciation and timeline presentations.

Expanding on one specific example, the Story of Writing examines more than the creation, development and impact of writing. It also examines why humans developed writing. By exploring the reasoning behind the development of writing and language, students can understand the basic need for communication for all cultures, both past and present. By identifying with early humans, students can relate to the similar desires of mankind. Students use their imagination to go back in time and visualize the desire to share information, to leave behind a legacy, or to tell a story.

The Story of Writing begins with our earliest ancestors struggling to survive. It examines early cave drawings and depictions of nature scrawled into rock. It goes on to discuss different cultures and the way they recorded their history, utilizing natural resources indigenous to their region. As the story progresses, the students hear the history behind the alphabet and follow the trail from one culture to the next as it progressed from the Phoenicians to the Greeks to modern day. The students learn about the explosion of mass communication with the industrial revolution allowing the speed of information to increase from a matter of months to days. Then, with the advancement and availability of computers, the speed of information became virtually instantaneous. However, instead of just absorbing this knowledge, the students are encouraged to consider the effects of such an advancement and examine the impact it has on society as a whole.

Many of the lessons presented in Montessori are given in such a historical context. By examining the history of a subject, a student also studies the history of different cultures, regions and mankind.

Life Skills: Life skills, known as Practical Life in the Montessori classroom, allow students the opportunity to develop and utilize skills that will help them to have meaningful interactions with society.

These lessons include, but are not limited to, taking turns, conflict resolution, peer mediation, table washing and setting, sewing, cooking, gardening, wood and brass polishing and care of the environment. While specific lessons are given in this subject area, practical life is so seamlessly interwoven into the curriculum that it often goes unnoticed. Students are responsible for the upkeep of their environment.

They select lessons and return their work as needed, returning materials in an appropriate state and to their designated spaces in an effort to get them ready for the next student. Students choose or are assigned jobs in the classroom, which help it to function without constant intervention from the teacher. For example, jobs may include librarian, math monitor, floor cleaner, trash remover, or window washer. Students responsible for each of these jobs ensure that the area is clean and prepared for the following day's work. Jobs are rotated on a consistent basis, encouraging the students to feel responsible for every aspect of the community. After initial lessons from the teacher, students are responsible for "training" the student who inherits their last job.

In addition to maintaining the environment, students experience practical life in a variety of ways. Students plan snack lists, go shopping, cook, make regular trips to the library, shop for plant or pet supplies, assist in fixing or replacing broken material, and sewing and mending cloth.

An important life skill is one's ability to get along with other members of his community. Therefore, great emphasis is placed on grace and courtesy, conflict resolution and peace education. Students are given the language necessary to bring about peaceful resolutions through the use of peer mediation lessons, modeling and role-playing. Manners, such as please and thank you, are stressed in the classroom and affirmations and compliments are utilized in regular classroom community meetings.

Peace Education: *"We must lay the foundation for peace ourselves by constructing a social environment, a new world for the child and adolescent, so that their individual conscience may develop. A vast education reform and above all a vast social reform for today."* - Maria Montessori.

Montessori schools are unique environments that build a strong sense of community through a strong peace curriculum. Students are taught early on how to respect each other, nature and the environment. Practical life skills help the child to develop a strong sense of ownership for the materials and the environment. The students are taught how to care for the classroom, nature and each other.

Each school year begins with an emphasis on peace education, specifically: respect (for self, others and the world), and grace and courtesy (care and compassion for self and others). This sets the foundation for the focus and concentration necessary for higher academic learning. The

elements of peace education are integrated into core academics throughout each school year, particularly literature, social studies, geography, music, and art.

In the Montessori environment, Peace Education involves children resolving conflicts with honesty and words, building a community of respect and courtesy in the classroom, and extending the sense of community to the world outside the classroom. These objectives are inherent in Montessori education. Maria Montessori recognized the spirit of love within all children and emphasized the need to nurture each child's inner spirit and educate children about themselves, their community, other cultures and their environment.

**Self-Awareness:** Through the study of body, mind, emotions, and spirit, children develop a greater sense of self-confidence and wellbeing. Through self-awareness activities, they develop a sense of peace within themselves.

**Cultural Awareness:** From an early age, the Montessori curriculum focuses on building an understanding of and compassion for other people. A respect for basic human rights is integrated into the study of diverse cultures. A consistent theme throughout the Montessori curriculum is diverse cultural studies and the contributions various cultures have made to the global community throughout history.

IMCS will also plan and hold an International Night each school year. Families are asked to select a country they would like to represent at International Night and are encouraged to discuss the culture, language, food, and geography of that country at home. In preparation for International Night, teachers will help students locate their country of choice on the world map, will discuss each of the country's unique characteristics, and will make available a flag-making lesson so that each child can make their country's flag. On International Night, families are invited to bring a dish from their country and to dress in traditional attire representing their country of choice.

**Environmental Education:** Through the many activities in a Montessori classroom, children learn how to be stewards of the environment. This is done by encouraging children to take care of their environment, both inside and outside the classroom. Environmental awareness focuses on the connectedness of the earth's elements and gives children deep respect for all life. IMCS will also create vegetable and herb gardens that students will tend to. With the help of parent volunteers and donations from the community, the gardens will consist of raised beds, rain barrels, and compost piles. Local farmers and market vendors (such as The Veggie Wagon in Carolina Beach and Carolina Farmin' in Wilmington) will be invited to come and give presentations on farming and the importance of eating fresh produce. Students will also have the opportunity to prepare snacks using vegetables and herbs harvested from the school gardens.

**Art and Music:** Art and music in the Montessori classroom are a combination of art/music history, art/music appreciation, and hands-on activities. Drama, speech, the use of art mediums, and the study of famous artists and plays will be studied. Students will have opportunities to develop and present in both written and live formats, which will strengthen academic skills and build self-esteem. In the study of art, Montessori teachers will provide lessons on different art periods, styles, and important artistic contributions. Additionally, while studying the fundamental needs of humans, students will explore the innate desire in humans to beautify their surroundings and themselves. These lessons will be presented as studies of past cultures, as well as current

regional styles. Students will conduct art research. They will study different styles, artists and time periods of art. Research will be presented in a variety of ways including report form, artistic renderings or timelines. They will experience art through a variety of means, including modeling, painting, stenciling, and diagramming and will incorporate this into other areas of their work. Art research will entail visits to art galleries, art fairs, museums or resident artists' visits.

Music is part of the Montessori prepared environment. IMCS students will study music from different cultures and time periods, important musicians, music styles, and types of instruments. Terms such as melody, beat, pace, scales, notes, chords, chorus, and call and response will be studied in class.

**Physical Health and Science:** Physical health and science will be incorporated into the daily routine of the curriculum, as well as during specific designated times. The Montessori curriculum also studies physical science including the fundamental physical needs of each five kingdom species, as well as anatomy studies. Movement is a constant and integral part of the Montessori classroom. Similar to other core subjects, physical health is interwoven throughout subject areas. Rather than sitting at an assigned spot throughout the day, the students are moving from work to work, interacting and affecting their environment.

**Movement:** Montessori was a firm believer that, from birth, children should be free to move and develop their physical movements. She advocated for not confining children to playpens or highchairs, but rather, to encourage independence and awareness by providing child-size furnishings for even the very young. Montessori recommends that an adult help the child learn orderly movements so that as they grow older, they gain more control over their bodies.

Montessori lessons are themselves, a guide to movement. In the Children's House, children are taught precise and orderly movement when they are introduced to a lesson.

In the elementary classrooms, specific works such as grammar command cards, call for specific actions to be performed. For example, an adverb command card might say "Walk slowly across the room. Quietly and thoughtfully observe a friend's work. Return to your spot briskly." Similarly, the verb work might include acting out an action while a friend guesses the verb, such as "balancing, leaning, and stretching."

Many other works such as the Big Bank Game require movement. In this math work, three friends are set up in different areas of the room. Each is dependent upon another in order to complete their work. One student must lie out and handle number cards, one must perform the calculation and the other verifies the number exchanges. Again, integrating movement with mathematics and grace and courtesy allows the child a holistic learning experience. In addition to classroom activity, IMCS will provide students with designated "physical education times" that are taught by the Montessori teacher. Students will work on small and large motor skill development and coordination. Emphasis will be placed on cooperative games and activities. It is through this continual movement that motor skills, both large and small, and their minds develop.

**Nutrition:** Healthy eating will be heavily promoted at IMCS. Children will be provided with healthy snacks daily, which will include fresh fruits and vegetables, cheese, and whole grains. Parents will receive information on what types of foods to pack in their child's lunch as well as what to



avoid. The school will also invite local nutrition and food experts to give presentations on healthy eating during one of the school's monthly Parent Information workshops.

Field Trips: While the occasional field trip occurs in the Montessori setting, this practice is largely supplanted by what Dr. Montessori referred to as "Going Out." This practice emphasizes out of school experiences as educational extensions of the classroom. "Going Outs" are student-led outings, which allow the student to expand on classroom learning. These experiences are initiated, planned and executed by the student. They enable the student to be in charge of his learning and experience the real-life applications of his study. Furthermore, they allow the student to be an active member of the community.

This practice has a two-fold effect. It allows the community the opportunity to experience Montessori education, while simultaneously giving the student the chance to become more comfortable with the functions of a community.

As opposed to traditional classroom field trips, in which the entire class participates at once, "Going Outs" are usually comprised of a small number of students who are interested in furthering their study of a particular subject. For example, a group of three students are studying sea turtles. In addition to using in-classroom materials and special interest books, the students contact the Pleasure Island Sea Turtle Project and set up a time to meet with someone to discuss their initiatives. To begin the process of the "Going Out," the group will propose to the teacher the benefits and feasibility of the trip. This is often done in written form. With the teacher's consent, the students find the phone number and speak directly to an agency contact person to arrange a meeting time. Then the students find a driver from a list of pre-approved volunteers (usually available parents who have agreed to chaperone at the beginning of the year). The students call the driver to see if he can accompany the group. Next, the students fill out permission slips, including the time, date and address of the "Going Out," the names of participants, the driver's name and the purpose of the trip. Permission slips are signed by the teacher and then sent home to be signed by the parent. After the signed slips are returned to school, the group of students prepares for the trip by continuing their research and formulating appropriate questions. Upon completion of the "Going Out," the students share their information and other interesting aspects of their experience with the rest of the class. Furthermore, a lesson on letter writing enables the students to follow up their meeting with a thank you note.

To facilitate "Going Out," the teacher will provide a "Going Out Resource," such as a binder or folder. This resource contains possible educational destinations, community events, and agency resource information or experiences, which can be utilized by the students or can act as a catalyst for future student study. For example, a flyer for an upcoming play may inspire a group of students to read the corresponding book and conduct a compare and contrast paper between the two.

Daily Schedule (tentative)

\*8:00-8:30 Arrival

\*8:15-11:15 Three-hour uninterrupted work cycle

\*11:15 Class Meeting/Circle Time

\*11:30 Recess

\*12:00 Lunch

\*1:00 Specials (Music, Art, Spanish, or P.E.)

\*1:45 Cultural Studies

\*2:00 Cultural Studies work period

\*2:45 Care of indoor and outdoor environment

\*3:00 Dismissal

**3. Demonstration that selected goals are clear, specific, measurable, ambitious and attainable.**

Island Montessori Charter School Student Achievement Goals 2013 – 2016

Goals	Strategies	Measures
<p>Goal #1 – By the end of 2016, the percentage of students in grades 3 through 8 enrolled in their second year who will meet or exceed student proficiency levels in reading and math as demonstrated on the End-of-Grade assessment will be 5% above the state's average.</p> <p>What we know: The state's averages in reading and math.</p>	<p>Maintain consistent and thorough implementation of Montessori theory and pedagogy.</p> <p>Hire highly qualified and experienced instructors.</p> <p>Evaluate academic achievement against normative and criterion measures (test scores + progress reports) and adjust curriculum where necessary.</p>	<p>Normative assessments Student progress reports Teacher observations EOG scores</p>
<p>Goal #2 – At the completion of each school year, all students at Island Montessori Charter School will demonstrate visible and measurable annual growth goals.</p> <p>What we know: We know Montessori curriculum is effective at moving students their annual academic goals.</p>	<p>Establish baseline data at the beginning of each year for each student.</p> <p>Teachers adhere to the Montessori Method and maintain a prepared environment that has within it the following areas for learning: Language, Math, Geometry, Science, Sensorial, and Practical Life.</p> <p>Teachers use daily observations to ensure all students are acquiring mastery of essential skills and adjust curriculum or provide interventions as needed.</p>	<p>Formative and summative assessments Teacher observations Student work samples Portfolios</p>
<p>Goal #3 – By the completion of each school year, each student will complete at least one service learning or community service project.</p> <p>What we know: A school very connected to its community grows better citizens.</p>	<p>Plan at least three field trips a year.</p> <p>Forge partnerships with community members and local organizations, such as Pleasure Island Sea Turtle Project, NC Aquarium at Fort Fisher, Carolina Beach State Park, etc.</p> <p>Incorporate environmental education and community service lessons into the Montessori curriculum.</p>	<p>Completion of projects</p>

<p>Goal #4 – By the completion of each school year, all students will demonstrate increasing levels of respect for self and others, concentration, self-motivation, self-reliance, compassion, and discipline.</p> <p>What we know: The Montessori method is effective at creating well-rounded, productive citizens and creative thinkers.</p>	<p>All classrooms will be well ordered, thoughtfully prepared Montessori environments equipped with high-quality Montessori materials.</p> <p>Teachers will maintain uninterrupted, two- to three-hour morning work cycles to ensure students are free to concentrate on their lessons and are acquiring the traits of a normalized Montessori student.</p>	<p>Teacher, faculty, and parent observations Discipline Data</p>
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*4. Entrance and exit requirements as well as graduation requirements (if the school is to be high school).*

This section is not applicable to Island Montessori Charter School.

5. The school calendar (must provide instruction for a minimum of 185 instructional days) (G.S.115C-238.29F(d)(1)) and how it coincides with the tenets of the proposed mission.

**Island Montessori Charter School  
2013/14 School Calendar**

<b>Date</b>	<b>Description</b>
August 19—23	Teacher Workweek
August 23	Open House
August 26	First Day of School
August 28	IMCS Board Meeting
September 2	Labor Day Holiday
September 18	IMCS Board Meeting
September 27	Half Day for Students, Staff Development
October 16	IMCS Board Meeting
October 25	Half Day for Students, Staff Development
November 8	No School, Conference Day
November 11	No School, Veterans Day
November 20	IMCS Board Meeting
November 27	Half Day for Students, Staff Development
November 28—29	Thanksgiving Holiday
December 20	Half Day for Students, Staff Development
December 23—31	Winter Break
January 1	Winter Break
January 15	IMCS Board Meeting
January 16	Half Day for Students, Staff Development
January 17	Teacher Workday
January 20	No School, MLK
January 24	Open House
January 27	No School, Professional Development Day
February 14	No School, Conference Day
February 17	No School, Presidents' Day
February 19	IMCS Board Meeting
March 14	No School, Professional Development Day
April 11	Half Day for Students, Staff Development
April 14—18	Spring Break
May 9	No School, Conference Day
May 21	IMCS Board Meeting
June 6	Last Day & Half Day for Students
June 9—11	Teacher Workdays
June 18	IMCS Board Meeting

*6. A concise description of any evaluation tool or test, if any, that the proposed charter school will use in addition to any state or federally mandated tests and how this data will be used to drive instruction and improve the curriculum over time for the benefit of students.*

Achievement at IMCS is based on the social, emotional and intellectual progress of each student. Therefore, assessment is not solely based upon test scores and grades, which reflect a limited aspect of intellectual ability and progress. Evaluation of student progress relies heavily on observation and verbal interaction as well as on work product. The staff establishes a school culture of high expectations for themselves and the student.

Montessori teachers assess the academic, physical, social, emotional, and developmental progress of the child. Specially designed classroom materials, presentation sequences, teacher observations, student record keeping and student work are part of the daily assessment of progress that is woven into the fabric of the Montessori classroom.

Assessment methods include:

Observation: Dr. Montessori was a scientist who spent countless hours observing her students. She watched carefully how each individual child responded to her environment. Following her example, each Montessori teacher is meticulously trained to observe her class as a whole and the individuals within it. She keeps records and makes notes of the following regarding how the student works on lessons:

1. Student use and facility with the materials
2. Student awareness of the self-correcting aspects of the materials
3. Creativity and exhaustion of the possibilities of the materials
4. Skipping steps – indicating readiness for the next level of presentations with the materials
5. Student enthusiasm and satisfaction
6. Repetition of activities
7. Success with the materials
8. Application of the concept outside of the use of the materials

The Three-Period Lesson: In the Montessori classroom, concepts are presented to the children through concrete, manipulative materials. Names of objects, concepts, and processes are given to the children through three-period lessons. The three-period lesson is given to the child after he has had a sensorial experience with the materials.

The three-period lesson involves three steps, using two or three objects, qualities, or concepts to start.

1. First period (Giving Information): This is an introduction. The teacher supplies the name, which allows the child to associate the name with what is being presented.

2. Second period (Familiarization): The second period consists in recognition of the object corresponding to the name. The child becomes familiar with what is being presented through repetition. The child comes to associate the name with the object or quality. This is the longest and most important period, as the subconscious is relating and recognizing the names with what is presented.
3. Third period (Verification/Test of Knowledge): This is the period of mastery and a test. This is a rapid verification of the name or concept given in the first period. The teacher elicits the information from the child.

Student Self-Reporting: Older students in the Elementary and Middle School classes become directly accountable for their work. Progress is assessed through the use of work diaries, weekly meetings with their teachers, work portfolios, peer editing, and group discussions.

- Work diaries/journals: Students are required to record their work choices, the amount of time spent working and how they spent their independent work time.
- Weekly meetings with the teacher: Students review their portfolios and work diaries with the guide on a weekly basis. Variety of work, skills practiced, lessons received and lessons needed are discussed. Quality of work and on-going projects are also reviewed during this meeting.
- Student work portfolios and capstone projects: Students keep all of their work in a portfolio. Middle School students spend the spring months working on a capstone project of choice that applies the skills that they have learned to a cross-curricular, in-depth project.
- Peer editing: Rubrics are designed to give students the opportunity to comment on the quality of each other's work. On a regular basis in the Elementary classes, older students are asked to assist their peers with materials or work that needs clarification. Middle School students are often required to have a peer edit their first draft before submission to the teacher.
- Group Discussions: Group discussions are held after students present completed work. These discussions allow for further comment on their research and writing.
- New Lessons: Additionally, students in a Montessori classroom are apt to request new lessons on work that they recognize they need to know or that they show interest in. Often the work of their peers inspires them to move onto the next level of work.

Testing: Testing is accomplished in the classrooms in different ways depending on the age of the child. The goal is mastery of a concept or material before the child moves to the next sequence of lesson presentations.

- The early materials are self-correcting and provide a "test" of skill within the use of the material. Children experience immediate feedback when a bead is left over or the "pieces" do not fit. They discover their mistake and try again without the teacher's help.
- The third step in each three-period lesson is a test of the knowledge the child has acquired throughout the period of work.
- Standardized testing is given to students in grades 3 through 8. IMCS will utilize a norm-referenced test whose results will serve as a guide for teachers to see what areas of the curriculum need attention. Parents use the information as a benchmark of what skills are strong

and which need to be practiced. Students are given the opportunity to practice their test-taking skills; however, valuable teaching time is not sacrificed in order to "teach to the test."

**Mastery and Transference:** With mastery and transference, students demonstrate mastery of one material before moving onto the next. The skills they learned with the first are transferred to and enlarged by the next.

- Every lesson has a prerequisite before it can be presented. Because of the clear sequence of lesson presentations, both teachers and students know when he/she is ready for the next level of presentations.
- A test of the level of mastery in a student's work is indicated in the transference of skills (i.e., the use of grammar in writing, the accuracy of arithmetic in mathematics, the skipping of steps in the use of materials). Teachers are trained to intercede when a child needs help or guidance and to stand back from the learning process when the student is successfully progressing.

*7. Provide an overview of the professional development needs associated with the mission and proposed instructional program. Be sure this discussion matches with the funding of the budget section.*

IMCS plans to develop a program of professional development and support for teachers that will ensure effective implementation of the education program and adherence to the school's mission.

IMCS believes that high quality teachers will be the cornerstone of the school's success and recognizes that Montessori teaching practice is unique and complex. Doing it well requires teachers to understand developmental theory and to master skills in observation, assessment techniques, classroom management for individualization, and carefully orchestrating sequences throughout the classroom's learning areas. However, it is expected that at the beginning of the charter term, not all of the teachers may be Montessori trained. Teachers who do not yet hold a Montessori teaching certification will be required to complete their training, which includes workshops and a yearlong internship with follow-up visits from the program's instructors. Teachers will have three years to earn their certification.

In addition, the school's professional development plan will include the following:

Supervision, coaching and individual growth plans: The school seeks to hire a Montessori-certified Head of School or Instructional Coordinator to supervise and guide teachers. They will spend time with teachers in their classrooms in order to evaluate their practice, and give them feedback and support. They will model lessons as well as observe lessons to support teachers in meeting the needs of all the students in their classrooms. In follow-up discussions, they will share and analyze their observations with the teacher. This data, along with student achievement data, will be used by the Head of School and/or Instructional Coordinator as well as the teacher to jointly design an individual growth plan for the teacher to include learning goals for the year, suitable workshops, courses and a series of suggested readings and/or resource materials.



Throughout the year, the Head of School will monitor the teacher's progress towards the goals and give appropriate feedback.

Weekly meetings and collegial support: Once a week, teachers will meet with the Head of School and/or Instructional Coordinator after school. During these meetings, teachers will analyze data, compare students' work with expected levels and achievement goals, analyze cases and share suggestions for resolving student difficulties, with an ongoing focus on accountability for student success. They will share effective teaching practices and collaborate. In addition, all teachers will have the opportunity to observe their colleagues during a morning work cycle. They will meet later to discuss their observations, ask questions and give feedback. In addition, class schedules will allow the teachers at the same level to meet weekly to share ideas, plan and otherwise collaborate.

Professional development activities: There are professional and staff development days at different points during the school year when there will be no school for the students. These days will be split up into data days and professional development days. During data days, teachers and administrative staff will review achievement data, adjust instructional planning, and monitor the schools progress toward its SMART goals. The professional development days will be devoted to in-house training with workshops given by specialists in areas considered necessary by the Head of School and/or Instructional Coordinator. Teachers will be encouraged to attend workshops and conferences as well as conduct visits in other Montessori schools.

#### Teacher Workday Assumptions:

- Teachers' workday will be from 7:30AM to 3PM daily. Teachers may have responsibilities after student dismissal at 3PM, which may include tutoring, professional development, family meetings, grade-level planning, or other meetings.
- Teachers will have a planning period daily while students are in specialist classes.
- Teachers will have a staff meeting on Fridays after early dismissal from 12:30PM to 3PM.

#### Accreditation

The Montessori Accreditation of Teacher Education (MACTE) is the accrediting organization that monitors Montessori schools and ensures that the schools have a consistent standard of education and training. Therefore, IMCS plans to seek accreditation from MACTE. Once accredited by MACTE, IMCS plans to become accredited by the American Montessori Society (AMS). AMS is one of the two main branches of Montessori education; the other is Association Montessori Internationale (AMI). AMS has successfully implemented Montessori pedagogy into over 400 Montessori public schools in the U.S., whereas AMI almost exclusively delivers Montessori education in private settings. IMCS also plans to become a member of the North American Montessori Teacher's Association (NAMTA), which provides schools, teachers, and parents with Montessori-related professional development and educational services.

Once accredited by AMS, IMCS plans to become an accredited Montessori teacher training site for AMS. Currently, there is only one Montessori teacher training site in North Carolina. As a MACTE

accredited AMS site, teachers interested in obtaining accreditation as a Montessori teacher would be able to complete all three components of the Montessori accreditation program – education, internship, and classroom – through IMCS. Candidates who successfully complete the program will earn a Montessori teaching certification.

Having a MACTE accredited AMS site will benefit IMCS and the Wilmington-area education community in a variety of ways. IMCS will always have a pool of qualified teachers to draw from. Additionally, as a training site, IMCS teachers will oversee interns, who would increase the number of educators in the school and contribute to the life-long learning climate of the school. Furthermore, other local public school teachers can participate in workshops, receive full Montessori certification, and learn Montessori pedagogy, which could then be implemented into the traditional public school setting. An additional benefit for IMCS will be the generating program revenue to support the school.

Until IMCS achieves MACTE accreditation, the school will collaborate with other Montessori schools and teacher training programs.

*8. An explanation of how the school will provide assistance to students that are not performing at expected levels to ensure the continued progress of student growth. The applicant needs to define their "expected levels" of performance and delineate a plan accordingly.*

#### Stages of Learning (Expected Levels of Student Performance):

In the Montessori classroom, teachers observe student progress on a daily basis. Teachers use checklists and/or write narrative descriptions of students, taking note of which of the three learning stages the child is at while working on lessons: Presented, Working, or Mastered.

**Presented:** The first stage of learning is the introduction of a concept. Every lesson in the Montessori classroom has a prerequisite before it can be presented. Because of the clear sequence of lesson presentations, both teachers and students know when he/she is ready for the next level of presentations.

**Working:** In this second stage of the learning process, the child is processing information and developing an understanding of the concept through work, experimentation, and creation.

**Mastered:** This is the stage of knowing or possessing an understanding of the information. This is demonstrated by the ability to pass a test with confidence, to teach another, or to express the concept with ease.

The stages of learning any concept are analyzed by the teacher and offered to the child. A child is always learning something that is indirectly preparing him to learn something else, making education a joyful discovery. Teachers make observations of the child's development on a daily basis. These observations are made on both the level of concentration of each child, and the introduction to and mastery of each curricular lesson. What the teacher observes in the child is

documented in writing and used in creating each child's Individual Work Plan. These documented observations are also used to communicate to the student and his/her parents the child's progress in each area of the curriculum. Through these means, all constituents are able to know what lessons have been presented, are in the working stage, and/or have been mastered by the child.

Island Montessori Charter School will use the RTI method (Response to Instruction) in determining and responding to the instructional needs of the students who are not making expected learning outcomes. By practicing the RTI method, the staff at IMCS will ensure that we are providing high-quality instruction and interventions matched to student needs using learning rate over time and level of performance to inform educational decisions. In order to be most effective, IMCS staff will carefully screen all students at the beginning of the year using specific math and reading assessments to determine which students need further analysis. In grade level teams, teachers, administration, and special education teachers will analyze all testing results to find deficits in reading components (phonemic awareness, phonics, fluency, and comprehension) and math concepts.

Based on these results, students with deficits will begin working on a more individualized basis in a smaller setting with a trained teacher or coach on a research-based program specifically designed to target deficits. The targeted students will be assessed every two weeks during a six-week period in order to monitor progress. After six weeks, students who make expected growth will no longer be a part of the intervention process and will continue to work with the teacher in the classroom. Students who do not make sufficient growth will either begin a different research-based program or spend more time working on the same program as a second intervention. Appropriate staff and parents will meet to discuss interventions and progress before the second six-week period begins. At the end of the second six weeks, appropriate staff and parents will meet to discuss outcomes. If the student does not make progress at this point, he/she will be referred for EC testing at the consent of the parent. All students at IMCS will be assessed three times per year in order to respond in a timely manner to any student who falls below the expected learning outcomes.

*9. Details in how the proposed charter plans to involve parents and community members within the school.*

Island Montessori Charter School believes that the relationship between family involvement in school activities and student academic success is crucial. Family involvement contributes to positive results for students, including higher achievement, better attendance, and more responsible preparation for class. Additionally, positive relationships and service links between the school and community organizations will further contribute to student success. IMCS students will be proud to represent their school within their community, and in turn, the community will be proud to host the school.

The school's plan for building family-school partnerships and working relationships and service links with community organizations includes two general components: (1) Creating an environment within the school itself that fosters family-school relationships and cultivates community, and (2)

Reaching out to organizations outside of the school to establish and nurture alliances that benefit students and the community at-large.

Community within the school: IMCS is committed to creating and maintaining a welcoming atmosphere within the school for students, parents, and staff. Plans for family-school community-building include:

- Creating the IMCS Family School Association to give parents opportunities to become involved in the school's decision-making process.
- Establishing a family volunteer program where families can volunteer to help with school projects and maintenance. Parents can share talents and special interests such as music, second language, arts, crafts, academic expertise, tutoring, and mentoring.
- Providing before and after school care for IMCS students.
- Holding monthly coffees before school or after drop-off at a nearby coffee shop to promote communication between the school's parents.
- Including a family hangout spot at the school (i.e. making the school playground available to families after school) to allow parents to connect at pick-up times.
- Holding parent information workshops to give parents opportunities to learn more about Montessori philosophy, positive parenting skills, school curriculum, and healthy eating to help families extend their child's Montessori education into the home.
- Holding a minimum of two parent-teacher conferences each year.
- Holding open houses where IMCS students present their classroom work to parents and siblings.
- Creating a school newsletter for IMCS families.
- Implementing an annual parent survey to allow parents to comment on school issues. IMCS will then use the data collected in these surveys to strengthen the school.

Community beyond the school: Island Montessori Charter School is committed to building lasting and purposeful relationships with community organizations in and near Pleasure Island. IMCS is particularly interested in partnering with organizations that serve underprivileged families and organizations that serve to further environmental education and preservation. Plans for building and maintaining relationships with community organizations include:

- Participating in community service projects, such as tree planting and trash collection at local parks, serving food at area shelters and kitchens, and participating in area food and clothing drives. A key component of the Montessori elementary curriculum is volunteer work, or 'giving back to the community.' All students, as part of their education, will be required to participate in volunteer opportunities and community service projects.

- Developing positive relationships with service agencies and businesses surrounding the school.
- Participating in established community activities.
- Helping to establish a North Carolina Montessori Association.
- Offering 'for credit' continuing education seminars for childcare providers, preschool teachers and elementary teachers not only for the school's staff, but also for educators not directly involved with the school.
- Recruiting potential IMCS families through extensive outreach efforts. The school plans to post flyers at local businesses, speak at neighborhood association meetings, advertise in neighborhood association newsletters, develop and maintain the IMCS website, and post on websites targeted to Wilmington families.
- Creating school-made flyers and surveys in both English and Spanish and translate materials to other languages to support multilingual families in the community.
- Recruiting potential IMCS families through partnerships with organizations that serve underprivileged families, such as Nourish NC! (a local nonprofit organization that collects and distributes food to local school children in need).
- Sponsoring a school-hosted community event that connects IMCS families with the surrounding community.
- Allowing the community to use the school's facilities during non-school hours for recreational activities, community gardening, and community meetings.
- Purchasing school supplies and equipment from neighborhood businesses as much as possible.
- Distributing the IMCS newsletter to the surrounding neighborhood and the school's community partners.
- Establishing the Funds and Community Outreach Committee to raise funds to support the school.

*10. Describe how the school will meet the needs of gifted, at-risk children, English language learners by explaining the proposed school's process for identification and service of these students.*

Dr. Maria Montessori launched her career working with special needs students under the influence of the writings of French psychologist Edouard Seguin, one of the patriarchs of special education. Likewise, her emphasis on hands-on, differentiated, self-paced learning guided by intensive and ongoing child study provides a template for best practice in addressing the needs of gifted, at-risk, and English Language Learners. Moreover, Montessori environments provide opportunities for free movement, choice, and extended periods of deep concentration; these

pillars of Montessori pedagogy also happen to be treatment strategies for ADHD. Perhaps most importantly, Montessori teachers are trained to perceive every child as exceptional and, in response, to hold flexible, individualized instruction in the highest regard.

Along with adhering to the Montessori approach to learning, Island Montessori Charter School will also use the RTI method (Response to Instruction) in determining and responding to the instructional needs of the students who are not making expected learning outcomes. By practicing the RTI method, the staff at IMCS will ensure that we are providing high-quality instruction and interventions matched to student needs using learning rate over time and level of performance to inform educational decisions. In order to be most effective, IMCS staff will carefully screen all students at the beginning of the year using specific math and reading assessments to determine which students need further analysis. In grade level teams, teachers, administration, and special education teachers will analyze all testing results to find deficits in reading components (phonemic awareness, phonics, fluency, and comprehension) and math concepts.

Based on these results, students with deficits will begin working on a more individualized basis in a smaller setting with a trained teacher or coach on a research-based program specifically designed to target deficits. The targeted students will be assessed every two weeks during a six-week period in order to monitor progress. After six weeks, students who make expected growth will no longer be a part of the intervention process and will continue to work with the teacher in the classroom. Students who do not make sufficient growth will either begin a different research-based program or spend more time working on the same program as a second intervention. Appropriate staff and parents will meet to discuss interventions and progress before the second six-week period begins. At the end of the second six weeks, appropriate staff and parents will meet to discuss outcomes. If the student does not make progress at this point, he/she will be referred for EC testing at the consent of the parent.

#### Gifted children:

Island Montessori Charter School defines the gifted and talented student as a child who performs at or shows the potential for performing at a remarkably high level of accomplishment when compared to others of the same age, experience, and environment and who exhibits high performance capability in an intellectual area or excels in a specific academic field.

IMCS believes that all gifted and talented students need a learning environment that enables learning outcomes consistent with their abilities and fosters lifelong learning. The Montessori method naturally supports the development of gifted and talented students by providing classrooms where students are free to respond to their natural tendency to work. A student's innate passion for learning is encouraged through opportunities to engage in spontaneous, purposeful activities with the guidance of a trained teacher. Through their work, children develop concentration and self-discipline. They progress at their own pace and rhythm within a framework of order and according to their individual capabilities. IMCS will provide further educational pathways and appropriately challenging enrichment, extension, and acceleration experiences to meet the needs of those students identified as gifted and talented.

### At-risk students:

The pillars of the Montessori philosophy – respect for the child, individualization of the program to each child, and fostering independence – are effective strategies for addressing the needs of at-risk children.

Throughout the courses of study, the Montessori lessons build from the simple to the complex, from the concrete to the abstract, and from precept to concept. Vocabulary and language usage are integral to each lesson. The procedures introduced through these presentations are designed to enhance attention, increase self-discipline and self-direction, and to promote order, organization, and the development of a work cycle. At-risk children benefit from the structure, the procedures, and the curriculum. Applications of this method require more teacher selection of materials and direct teaching, particularly of language and math symbols and their manipulations.

### Special needs children:

Current early intervention models designed to assist students who are not performing at expected levels are grounded in principles central to Montessori pedagogy, including mixed-age grouping, differentiation, and ongoing observation. In fact, Dr. Maria Montessori is often given credit for constituting the world's first inclusion model of support services.

Montessori environments provide opportunities for free movement, choice, and extended periods of deep concentration. Perhaps most importantly, Montessori teachers are trained to perceive every child as exceptional and, in response, to hold flexible, individualized instruction in the highest regard.

### English Language Learning (ELL) students:

The Montessori curriculum integrates literacy into all of the subjects, which will be a benefit to English Language Learners.

To ensure IMCS is meeting the needs of English Language Learners, the parents of all incoming students will complete a comprehensive Home Language Survey (HLS) during the registration process. IMCS also reviews files from previous schools to determine if students are currently identified as ELL. The HLS asks a variety of questions designed to determine if the primary, or home, language of the student is a language other than English. If it is determined that the primary or home language is other than English, the student will be enrolled in classes and given the same opportunities as all IMCS students.

A student that has another language indicated on the HLS will be assessed to determine their proficiency in English. As North Carolina is a member of the WIDA Consortium, the W-APT (WIDA-ACCESS Placement Test) will be used. The results of the W-APT will initially guide services provided to the student.

Additionally, the school will annually assess the English proficiency of ELL students through the use of the ACCESS for ELLs test, provided by the WIDA Consortium. This assessment will be

used to modify instruction to meet each student's needs as well as to determine if a child is ready to exit the ELL programs provided at the school.

Parents and families of all IMCS students will be treated as valuable community members. The school will encourage ELL families to participate in school activities, including volunteering and featuring their cultural traditions within the curriculum and other school functions. IMCS will consult with specialists to meet the needs of ELL students and develop an improvement plan to meet the needs of these students.

Pursuant to North Carolina charter school law (G.S. 115C-238.29F9(g)(5), the school shall not limit admission to students on the basis of intellectual ability or measures of achievement or aptitude. In order to accommodate students who have been identified as having special needs, the school will provide special education and related services to those students to ensure that any required modifications and accommodations are made.

*11. Discuss any proposed extra-curricular activities to be offered by the school and how these offerings match the over-all mission of the school.*

Within the IMCS program, students will be encouraged to participate in activities that move them toward accomplishing their individual learning goals. As IMCS grows, the school will provide a rich Specials and Extracurricular Program. This program will include instruction in Art, Music, Drama, Spanish, Physical Education, Chess Club, Dance, Gardening, and Community Service. IMCS will seek parents and community members willing to volunteer their time and expertise to coordinate after school clubs and programs. Our area also has a thriving community of artists and musicians who IMCS intends to partner with to extend our cultural awareness and arts programs within the school. Community service is a key component of the school's program; therefore, the school intends to build strong, lasting partnerships with local nonprofits who can help guide the school's community service program, which will include volunteering and community service projects, such as participating in food and clothing drives.



## **B. SPECIAL EDUCATION**

*The charter school must accept special needs children under the federal legislation Individuals with Disabilities Education Act (IDEA) (20 U.S.C. 1400 Et seq.) and the state legislation (G.S. 115C-106 Et seq.). The proposed school will abide by the charter school legislation, G.S. 115C-238.29F(g)(5), as stated below:*

*A charter school shall not discriminate against any student on the basis of ethnicity, national origin, gender, or disability. Except as otherwise provided by law or the mission of the school as set out in the charter, the school shall not limit admission to students on the basis of intellectual ability, measures of achievement or aptitude, athletic ability, disability, race, creed, gender, national origin, religion, or ancestry.*

*Provide a clear and thorough explanation of the procedures the proposed charter will follow to insure compliance of the above laws. As part of this section, the plan should include how you will identify and meet the needs of your projected students (at-risk, gifted/talented, English language learners, and students with disabilities) in a manner that aligns with the overall curriculum, instructional approach, and mission.*

Island Montessori Charter School will meet all applicable state and federal requirements including the Individuals with Disabilities Education Act (IDEA) and G.S 115C-238.29F(g)(5). Exceptional students 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 be served in the least restrictive environment possible. A full continuum of delivery models will be available for exceptional students including physical, occupational, and speech/language therapy.

Island Montessori Charter School will hire special education teachers as needed to work both as inclusion teachers in the classroom setting and consultants to classroom teachers to help them better meet the needs of exceptional students. We will provide educational testing and will meet other therapeutic needs through outsource contracts or through hiring of staff as necessary. All regular classroom teachers will participate in training to help them better meet the needs of exceptional students in their classrooms. We believe that the instructional model we use for all students is well-suited to exceptional students. Montessori curriculum offers individualized and differentiated instruction that focuses on the individual child. Planning for the needs of a variety of learning styles in the classroom will also facilitate meeting the needs of our exceptional students while still giving them the many advantages of being in mainstream classroom settings.

### **C. STUDENT CONDUCT AND DISCIPLINE**

*(G.S.115C-238.29B(b)(12); G.S. 115C-238.29F(d)(4 and 5))*

*Provide drafts, included in this section, of student handbooks and other policies governing student conduct and discipline. Include policies and procedures governing suspension and expulsion of students. Specifically address these policies with respect to exceptional children. Also describe how a parent could appeal the decision of a school administrator through a grievance process.*

## **Island Montessori Charter School Draft Student Code of Conduct**

Montessori education is based on empowering the student to make appropriate decisions about behavior in an atmosphere of mutual respect and trust. There is no place for corporal punishment or emotional intimidation in a Montessori environment.

Our child-centered, non-authoritarian philosophy on discipline will focus on helping our children grow to be self-disciplined, self-moderating, and internally motivated by respect for themselves and others. To this end, IMCS stands committed to the practice of both positive discipline and conflict resolution grounded in the principles of restorative justice. At IMCS, all children will learn the social skills that are fundamental to their individual growth as informed, ethical and responsible citizens of a globally-defined community.

IMCS strives to provide a safe and positive environment where children learn to appropriately communicate, play and work within a diverse community of individuals. Children can learn by role-playing acceptable alternatives to hitting, screaming, biting, scratching, name-calling, etc. These lessons are given individually and at group time throughout the year as needed.

IMCS will also use peer problem solving and peace education whenever possible when children have disagreements. Children who are not able to control their actions will stay with a teacher or sit alone until they are able to gain control. Whenever possible, children are allowed to experience the natural and/or logical consequences of their actions. For example, if a child throws a puzzle, she will be expected to pick it up and then find other work that can be handled more appropriately. For more serious situations such as biting, hitting, or refusal to cooperate, parents will be called to pick up their child.

The expectations are designed to ensure that students are treated fairly and can recognize consequence. Student conduct is not simply a policy, but a fundamental incorporated into the daily routine. Students are expected to demonstrate behaviors that benefit the community by embracing the following pillars of conduct:

- Respect for self, others, and the environment;
- Citizenship, which involves encouraging, supporting, and participating in the community;
- Leadership, which includes setting good examples, being comfortable in the minority; exhibiting confidence in one's own moral compass, and embracing the fact that every individual has the ability to make a positive difference;
- Listening to oneself, to others, and to instructions;

- Responsibility, including accepting consequences for one's actions, and making sound, moral decisions.

In keeping with the Montessori philosophy, teachers will, with student input, establish behavioral expectations, classroom rules, and consequences at the beginning of each school year. IMCS has high expectations of students and is committed to helping children learn, respond to, and ultimately meet those expectations. Teachers will provide initial levels of correction to disciplinary matters.

Corrections might include:

- Positive instruction
- Interruption or redirection
- Reminding students of expectations and consequences
- Restrictions or removal of privileges and opportunities

In those cases when first-response corrections are not effective, the teacher, Head of School, student, and parents will meet to develop a behavior plan to motivate the student to correct his or her behavior. The plan will be recorded in the student file and re-evaluated at time intervals set by the group.

Repeated behavioral issues that teachers feel incapable of managing and that are detracting from the educational needs of the other students will be evaluated by the Head of School who may advise that the student be removed from the school, although every effort will be made to inspire positive behavioral changes.

Should removal of a student become necessary, the Head of School shall advise the Board of Directors of such a decision. The student's parents may follow a grievance process with the board if they feel the findings are unsatisfactory.

IMCS recognizes that certain behaviors warrant further action, including the following:

- Fighting
- Intimidating and/or bullying
- Stealing or cheating
- Vulgar, profane or obscene language
- Defiance of authority
- Insolence or rudeness
- Arson
- Possession of a real, look-alike, or pretend firearm or weapon; or explosive or flammable material
- The sale or distribution of a drug, controlled substance
- Using or threatening to use serious force
- Leaving school and/or school activities without permission
- Excessive class disturbances documented by staff or classroom teacher

Consequences for Unacceptable Behavior:

- Unacceptable behavior may result in an in-school or out-of-school suspension of the student. Exceptions may be made on a case-by-case basis through the administration. Before the student returns to class one or more of the following steps may be initiated:
  - The student meets with the Director and classroom teacher to discuss the incident and develops

a plan to ensure the behavior does not occur in the future.

- The Director meets with the parent/guardian and the student to discuss the incident and develop a plan to ensure the behavior does not occur in the future.
- The student may be referred for further counseling and behavioral services, with removal from the classroom for a period of time. Parent/Guardian involvement is required.

When making decisions regarding consequences as well as the processes leading to potential removal from school, consideration will be given to the following:

- Student's behavioral history
- Self-defense
- Any disability that substantially impairs the student's ability to judge the wrongfulness of her or his conduct

#### Appeal Process:

If the student or parent/guardian is not satisfied with the Head of School's decision, an appeal may be made to the Board within five school days of the notice of the Head of School. The appeal shall be in writing and shall be limited to the issues raised at the hearing before the Head of School.

The Board of Directors shall notify the student/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 of Directors may select two or more board members to hear the appeal on behalf of the entire Board. An official tape recording shall be made of the appeal hearing.

The student/parent/guardian and the Director may attend the hearing to argue their respective positions. The Board of Directors may decide the appeal on record or may receive additional testimony and evidence as needed.

The Board of Directors shall make 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. The Board of Directors shall comply with the applicable law in determining whether to permanently expel a student from school.

#### Suspension of Exceptional Child:

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 or expulsion 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:

- (1) whether the child is presently receiving appropriate education, and
- (2) whether medication is needed or present medication is appropriate.

If the review establishes no such relationship, the school may initiate its normal disciplinary procedures, but must continue to provide those services that the school based committee finds are necessary to prevent the student from regressing educationally during the suspension. If the review

does establish such a relationship, the school may not initiate its normal disciplinary procedures. The findings should be used in determining an appropriate program.

#### Due Process Rights:

In actions involving suspension of a special needs child for more than ten days in a school year, the parties have available all due process rights of North Carolina General Statute 115C-116 and 20 and United States Code 1415.

#### Absences:

IMCS encourages students and parents to take the responsibility to ensure that the student is in attendance as much as possible as attendance is paramount to the student's academic success. In order for an absence to be excused, the parent or guardian must submit a note of explanation within two days of the absence. Students are expected to make up all missed work unless excused in writing by the Director considering extenuating circumstances.

#### Excused Absences

- Absence due to injury or illness as reported and approved by the parent and/ or legal guardian.
- Absence due to injury or illness as documented by a physician.
- Absence due to doctor or dentist appointment that cannot be taken care of outside the normal school day.
- Absence due to death in the family or life-threatening family emergency.
- Absence due to religious observation of a holiday or ritual.
- Absences pre-approved by the Head of School, which may include:
  - Family travel
  - Educational vacation
  - Involvement in an athletic or community event

#### Dress Code:

Students' apparel should reflect respect for themselves and their community. Apparel that distracts from the learning environment is not acceptable. It is recommended that children wear comfortable and washable clothing that will enable them to participate freely in the many activities of the day.

All students must have a special pair of comfortable shoes that they wear inside the classroom.

#### Health Services:

In accordance with state policy: no child shall be permitted to attend school unless a certificate of immunization indicating the child has received the immunizations required by G.S.130A-152 is presented to the school. If, on the first day of attendance, the child does not present such a certificate, the parent or legal guardian shall be notified. This person shall be given thirty (30) calendar days from the first day of attendance to obtain the required immunizations for the child. If, following approved medical practice, the administration of a vaccine requires more than thirty (30) calendar days to complete; additional days may be allowed in order to obtain the required immunization. At the end of the thirty (30) calendar days or extended period, if the required immunizations or signed exemption for have not been obtained, the school shall withdraw the child.

**D. TIMELINE**

*Please create and describe a detailed start-up plan, identifying major tasks, timelines, and responsible individuals for accomplishing those tasks.*

Island Montessori Charter School – Timeline 2012/2013	
Date	Goal/Task
April 2012—February 2013	<ul style="list-style-type: none"> <li>• Continue to raise awareness about charter school application</li> <li>• Host educational events</li> </ul>
June 2012	Board Members meet with Charter School Advisory Council for first-round interview
February 2013	<ul style="list-style-type: none"> <li>• IMCS Application is approved</li> <li>• Host community event</li> <li>• Send out fundraising emails</li> <li>• Initiate fundraising events, with goal of raising \$100K</li> <li>• Press Release/Media update</li> <li>• Initiate grant writing</li> <li>• Attend training in Raleigh</li> </ul>
March 2013	<ul style="list-style-type: none"> <li>• Purchase necessary equipment and materials</li> <li>• Post job description for Head of School in all appropriate outlets</li> <li>• Attend training in Raleigh</li> <li>• Finalize school site and lease</li> </ul>
April 2013	<ul style="list-style-type: none"> <li>• Hire Head of School</li> <li>• Post job descriptions for staff in all appropriate outlets</li> <li>• Complete publications: student application, school handbook, forms</li> <li>• Attend training in Raleigh</li> </ul>
May 2013	<ul style="list-style-type: none"> <li>• Begin registration and enrollment</li> <li>• Hold first student lottery</li> <li>• Attend training in Raleigh</li> </ul>
June 2013	<ul style="list-style-type: none"> <li>• Hire staff</li> <li>• Begin training</li> <li>• Attend training in Raleigh</li> </ul>
July 2013	<ul style="list-style-type: none"> <li>• Finish staff training</li> <li>• Attend training in Raleigh</li> </ul>
August 2013	<ul style="list-style-type: none"> <li>• Community Open House</li> <li>• Press Release for Grand Opening</li> <li>• Parent Orientation</li> <li>• Open doors – First Day of School</li> </ul>
October 2013	First Annual School Fundraiser

**E. PRIVATE SCHOOL CONVERSIONS**

*Complete ONLY if the proposed charter is a private school conversion.*

This section is not applicable to Island Montessori Charter School.

## IV. BUSINESS PLAN

### **A. PROJECTED STAFF:**

*1. Provide a list of positions anticipated for the charter school; (e.g., principal or director; support staff; teachers, part-time and full-time; paraprofessionals/teaching assistants, clerical, and maintenance.).*

Charter School Staff	2013/14	2014/15	2015/16	2016/17	2017/18
Head of School	1	1	1	1	1
Instructional Coordinator	0.5	1	1	1	1
Business Manager	0.5	1	1	1	1
EC Coordinator	0.5	1	1	1	1
Lead Teachers	8	9	10	12	12
Assistant Teachers	8	9	10	12	12
EC Teachers	0.5	0.5	2	2.5	3
Office Manager	1	1	1	1	1
Specials Teachers: Spanish, Music, Art, PE, & Environmental Ed. (These positions will go from part-time to full-time in 2015/16)	4	4	4	4	4

*2. Discuss how the school will develop, mentor, retain, and evaluate staff in a format that matches the school's mission and educational program. Please include a timeline, steps to be taken, and a lead contact.*

IMCS plans to develop a program of professional development and support for teachers that will ensure effective implementation of the education program and adherence to the school's mission.

IMCS believes that high quality teachers will be the cornerstone of the school's success and recognizes that Montessori teaching practice is unique and complex. Doing it well requires teachers to understand developmental theory and to master skills in observation, assessment techniques, classroom management for individualization, and carefully orchestrating sequences throughout the classroom's learning areas. However, it is expected that at the beginning of the charter term, not all of the teachers may be Montessori trained. Teachers who do not yet hold a Montessori teaching certification will be required to complete their training, which includes workshops and a yearlong internship with follow-up visits from the program's instructors. Teachers will have three years to earn their certification.

In addition, the school's professional development plan will include the following:

Supervision, coaching and individual growth plans: The school seeks to hire a Montessori-certified Head of School or Instructional Coordinator to supervise and guide teachers. They will spend time with teachers in their classrooms in order to evaluate their practice, and give them

feedback and support. They will model lessons as well as observe lessons to support teachers in meeting the needs of all the students in their classrooms. In follow-up discussions, they will share and analyze their observations with the teacher. This data, along with student achievement data, will be used by the Head of School and/or Instructional Coordinator as well as the teacher to jointly design an individual growth plan for the teacher to include learning goals for the year, suitable workshops, courses and a series of suggested readings and/or resource materials. Throughout the year, the Head of School will monitor the teacher's progress towards the goals and give appropriate feedback.

Weekly meetings and collegial support: Once a week, teachers will meet with the Head of School and/or Instructional Coordinator after school. During these meetings, teachers will analyze data, compare students' work with expected levels and achievement goals, analyze cases and share suggestions for resolving student difficulties, with an ongoing focus on accountability for student success. They will share effective teaching practices and collaborate. In addition, all teachers will have the opportunity to observe their colleagues during a morning work cycle. They will meet later to discuss their observations, ask questions and give feedback. In addition, class schedules will allow the teachers at the same level to meet weekly to share ideas, plan and otherwise collaborate.

Professional development activities: There are professional and staff development days at different points during the school year when there will be no school for the students. These days will be split up into data days and professional development days. During data days, teachers and administrative staff will review achievement data, adjust instructional planning, and monitor the schools progress toward its SMART goals. The professional development days will be devoted to in-house training with workshops given by specialists in areas considered necessary by the Head of School and/or Instructional Coordinator. Teachers will be encouraged to attend workshops and conferences as well as conduct visits in other Montessori schools.

## Accreditation

The Montessori Accreditation of Teacher Education (MACTE) is the accrediting organization that monitors Montessori schools and ensures that the schools have a consistent standard of education and training. Therefore, IMCS plans to seek accreditation from MACTE. Once accredited by MACTE, IMCS plans to become accredited by the American Montessori Society (AMS). AMS is one of the two main branches of Montessori education; the other is Association Montessori Internationale (AMI). AMS has successfully implemented Montessori pedagogy into over 400 Montessori public schools in the U.S., whereas AMI almost exclusively delivers Montessori education in private settings. IMCS also plans to become a member of the North American Montessori Teacher's Association (NAMTA), which provides schools, teachers, and parents with Montessori-related professional development and educational services.

Once accredited by AMS, IMCS plans to become an accredited Montessori teacher training site for AMS. Currently, there is only one Montessori teacher training site in North Carolina. As a MACTE accredited AMS site, teachers interested in obtaining accreditation as a Montessori teacher would be able to complete all three components of the Montessori accreditation program – education, internship, and classroom – through IMCS. Candidates who successfully complete the program will earn a Montessori teaching certification.



Having a MACTE accredited AMS site will benefit IMCS and the Wilmington-area education community in a variety of ways. IMCS will always have a pool of qualified teachers to draw from. Additionally, as a training site, IMCS teachers will oversee interns, who would increase the number of educators in the school and contribute to the life-long learning climate of the school.

#### Retention

Retention of professional staff (teachers and administrators) is an organizational goal for IMCS. The school will offer competitive salaries and benefits, with incentives to remain at the school for three years or longer, such as assistant support, exceptional opportunities for professional development and training, collegial observation and collaboration, and opportunities for professional dialogue, decision-making, and development. As the school grows, the Board will consider offering stipends and bonuses for teacher leadership roles.

Administrators will work to build mutually respectful and supportive professional relationships to propel individual development and the work of the school. There will be an open door policy where colleagues will feel it is acceptable and productive to raise questions, concerns or issues for consideration or problem solving. All professional staff and administrators will complete annual school satisfaction surveys and have opportunities to influence decisions on the work environment, the school's practices with students, and the school growth goals.

#### Evaluation

Teacher evaluation at IMCS will take into account not only student results on standardized tests and yearly test score gains, but also other measures of student outcomes, such as authentic product assessments, formative and summative assessments and portfolios, in addition to Head of School evaluations of teaching practice.

Throughout the week, the Head of School and/or the Instructional Coordinator will visit each classroom to carry out informal observations of the teacher, and will make at least one formal observation visit per year. Rubrics for observation of teachers will be organized around six domains: planning and preparation for learning; classroom management; delivery of instruction; monitoring assessment and follow-up; family and community outreach; and professional responsibilities. In a follow up discussion, the Head of School will analyze these observations with the teacher, and provide feedback and recommendations, in order to help the teacher grow and learn.

At the end of spring, the Head of School will evaluate teachers by analyzing student results on standardized tests, yearly standardized test score gains, student results on interim and final summative assessments, authentic product assessments, portfolios and student presentations, as well as records of the Head of School's and the Instructional Coordinator's observations and the results of their evaluations of each teacher's teaching practice. The Head of School will prepare a written report to discuss with the teacher in a formal evaluation conference.

### IMCS Staff Development Timeline

March 2013	Post job description for Head of School in all appropriate outlets
April 2013	Hire Head of School Post job descriptions for staff in all appropriate outlets Become member of North American Montessori Teachers' Association (NAMTA) Become member of Montessori Administrator's Association (MAA)
June 2013	Hire staff
August 16 – 23	Staff training
September 27	Staff Development Day
October 25	Staff Development Day
November 27	Staff Development Day
December 20	Staff Development Day
January 16	Staff Development Day
April 11	Staff Development Day
Spring 2014	Head of School conducts formal, end-of-year teacher evaluations
May 2014	Earn accreditation from American Montessori Society (AMS) Earn accreditation from Montessori Accreditation Council for Teacher Education

### 3. Also include the following information for the proposed charter school:

#### a. Process to advertise for and employ members of the school

In order to obtain an applicant pool with characteristics appropriate to the school's mission and culture, recruitment will take advantage of the networking resources of the Head of School and of the members of the Board, as well as the American Montessori Association and NAMTA (North American Montessori Teachers' Association), with which the school will be a member. It will advertise in teacher job fairs, local colleges and universities, newspapers and Internet job and Montessori sites. Other staff will be advertised in University of North Carolina at Wilmington, local newspapers and Internet job sites.

#### b. Procedures for grievance and/or termination

#### Grievance Policy

Each employee has a general duty to report all potentially illegal or unethical conduct by the school or a fellow employee, as well as potential violations of the school code of conduct or ethics handbook. The process for an employee to raise a grievance is as follows:

- The employee brings his/her concern to the Instructional Coordinator in writing. This report should include the date of the report, the date of the alleged incident, persons involved, a description of the incident, and any supporting documentation.
- If the employee is not satisfied with the response, s/he may put the concern in writing and give it to the Head of School or another member of the Board, who will forward it to the Executive Committee.
- The Executive Committee will investigate the concern and respond to the employee in writing. The Executive Committee will provide the Board of Directors with a report at the next Board of Director's meeting.

In the event that the complaint involves a procedure, action, or directive of the Head of School, an employee may file a complaint with the Board of Directors. In such instances, the Board will be the investigator and final arbiter of the complaint. Information must be submitted to the Business Manager for the Board.

No disciplinary action shall be taken against any employee who reports harassment or discrimination, unless following investigation, the employee is found to have made the report in bad faith.

### Employee Termination

#### Resignation

An employee who works directly with students who wishes to resign is requested to give two (2) weeks' written notice to the Head of School. In the case of the Head of School, s/he is requested to do the same with the Board of Directors. An employee who does not work directly with students is requested to give four weeks' written notice to the Head of School.

#### Termination of Employment

IMCS reserves the right to terminate employees at any time for any reason, including poor performance, misconduct, neglect of duty, incompetence, inefficiency, dishonesty, breach of trust, fraud, moral turpitude, or violation of any of the policies or procedures set forth in this Employee Handbook.

#### Reasons for Termination

To ensure orderly operations and to provide the best possible work environment, IMCS expects employees to follow rules of conduct that protect the interests and safety of all employees, students, and the school community.

It is not possible to list all the forms of behavior that are considered unacceptable in the workplace. The following are examples of infractions of rules of conduct that may result in disciplinary action, up to and including immediate termination. While this non-exhaustive list enumerates grounds for termination, this list in no way should be read to limit the —at will status of employees of IMCS. The list includes:

1. Destruction, damage, theft or unauthorized possession, use or removal of IMCS property or the property of others;
2. Inefficient or careless job performance or inability to perform job duties satisfactorily;
3. Failure to promptly report to the Head of School an on-the-job injury or accident involving an employee, student or visitor of IMCS or involving IMCS property;
4. Negligence that results in injury to an IMCS employee, student or visitor or damage to IMCS property or the property of others;
5. Irregular attendance, including unreported or excessive tardiness or absence from work, or failure to request and obtain an approved leave of absence or extension of a leave of absence in a timely manner,
6. Insubordination, including refusal or failure to perform assigned work;

7. Possessing or being under the influence of alcohol or illegal drugs during working hours or while on IMCS premises;
8. Fighting, provoking a fight or threatening violence during working hours or while on IMCS premises;
9. Interfering with others in the performance of their jobs;
10. Sexual or other unlawful harassment;
11. Making malicious, false or derogatory statements that may damage the integrity or reputation of IMCS or fellow co-workers;
12. Misrepresenting or withholding pertinent facts in securing employment with IMCS;
13. Refusing to follow instructions of supervisors or other authorized personnel, being rude or discourteous to supervisors, fellow employees, or visitors or engaging in any action which endangers the health or safety of others;
14. Unauthorized use of IMCS telephones, computers or other equipment owned by IMCS;
15. Possession, display or use of explosives, firearms other dangerous weapons during working hours or while on IMCS premises;
16. Engaging in any activity which is in conflict with the best interests of IMCS; and
17. Failure or refusal to follow general policies, rules and procedures of IMCS.

c. Sample employment policies to be implemented by the proposed charter school

## **Sample IMCS Employee Handbook**

### **A. RULES OF CONDUCT**

All employees of IMCS are expected to act with good common sense and in a professional manner. To ensure orderly operations and provide the safest possible work environment, IMCS expects all employees to abide by certain rules of conduct. While it is not possible to list all the forms of behavior that are considered unacceptable in the workplace, the following are examples of conduct which may result in disciplinary action in the sole and exclusive discretion of IMCS, up to and including discharge.

1. Destruction, damage, theft or unauthorized possession, use or removal of IMCS property or the property of others;
2. Inefficient or careless job performance or inability to perform job duties satisfactorily;
3. Failure to promptly report to the Head of School an on-the-job injury or accident involving an employee, student or visitor of IMCS or involving IMCS property;
4. Negligence that results in injury to a IMCS employee, student or visitor or damage to IMCS property or the property of others;
5. Irregular attendance, including unreported or excessive tardiness or absence from work, or failure to request and obtain an approved leave of absence or extension of a leave of absence in a timely manner,
6. Insubordination, including refusal or failure to perform assigned work;
7. Possessing or being under the influence of alcohol or illegal drugs during working hours or while on IMCS premises;
8. Fighting, provoking a fight or threatening violence during working hours or while on IMCS premises;
9. Interfering with others in the performance of their jobs;
10. Sexual or other unlawful harassment;

11. Making malicious, false or derogatory statements that may damage the integrity or reputation of IMCS or fellow co-workers;
12. Misrepresenting or withholding pertinent facts in securing employment with IMCS;
13. Refusing to follow instructions of supervisors or other authorized personnel, being rude or discourteous to supervisors, fellow employees, or visitors or engaging in any action which endangers the health or safety of others;
14. Unauthorized use of IMCS telephones, computers or other equipment owned by IMCS;
15. Possession, display or use of explosives, firearms other dangerous weapons during working hours or while on IMCS premises;
16. Engaging in any activity which is in conflict with the best interests of IMCS; and
17. Failure or refusal to follow general policies, rules and procedures of IMCS.

These acts of misconduct are by no means complete, but are intended to serve as a general framework for employee conduct. IMCS reserves the right, in its sole and absolute discretion, to add or delete offenses and to take such disciplinary actions, up to and including discharge, as are necessitated by the particular circumstances of a given case.

#### **B. ATTENDANCE**

Regular, on-time attendance is very important to the effective operation of IMCS. Absenteeism and tardiness place a burden on all employees. Poor attendance and excessive tardiness may result in disciplinary action, up to and including discharge.

In the case of foreseeable absences, employees must provide the Head of School with a sufficient explanation for the absence and obtain advance approval. In the rare instance when an employee is unexpectedly unable to work as scheduled or cannot avoid being late for work, the employee should notify the Head of School as soon as possible in advance of the anticipated absence or tardiness.

#### **C. SEXUAL AND OTHER UNLAWFUL HARASSMENT**

It is the policy of IMCS to provide an environment that is free from unlawful harassment. Therefore, all forms of harassment related to an employee's race, color, religion, sex, gender, national origin, age, disability or any other characteristic protected by law constitute violations of this policy. In furtherance of this policy, IMCS strictly prohibits and will not tolerate the use of racial, religious, sexual, ethnic, disability-based, gender-based or age-related epithets, innuendoes, slurs or jokes within its facilities. In addition, all forms of verbal and physical harassment based on the above categories are strictly prohibited.

With regard to sexual harassment in particular, unwelcome sexual advances, requests for sexual favors and other verbal or physical conduct of a sexual nature are considered instances of sexual harassment when:

Such behavior has the purpose or effect of unreasonably interfering with an employee's work performance or creates an intimidating, hostile or offensive work environment,  
An employee's submission to or rejection of such conduct is used as the basis of employment decisions that affect the employee, or

Submission to such conduct is implied or stated to be a term or condition of the employee's employment.

It is important to remember behavior that one individual considers innocent or harmless may be regarded as sexual or other unlawful harassment by another person. Beyond being in violation of our IMCS policy, sexual and other unlawful harassment is against the law, and IMCS will not tolerate such harassment of its employees by anyone, including IMCS employees or individuals conducting business with IMCS. Any employee who violates the harassment policy or our commitment to equal employment opportunity will be subject to immediate disciplinary action, up to and including discharge.

If at any time an employee feels that he or she has been subjected to or has observed verbal or physical harassment, of a sexual nature or otherwise, the employee must report such conduct to the Head of School immediately so that an investigation can be initiated and appropriate action taken. If for any reason the employee does not feel comfortable contacting the Head of School about the matter, the employee must report the matter to a member of the IMCS Board of Directors. The confidentiality of all such inquiries will be respected to the fullest extent possible. Employees will not be retaliated against in any manner for reporting perceived harassment pursuant this policy.

#### **D. OUTSIDE EMPLOYMENT**

All full-time employees are expected to treat their employment with IMCS as their primary job. If you have another job or if you are doing work on your own, you must still have good attendance, perform satisfactory work and be available during the working hours assigned to you. Your other job must not conflict with the duties to which you have been assigned or give the appearance of such a conflict. Employees must inform the Head of School of any outside employment in which they are involved.

##### **Board Policy:**

Except as set forth below, as a general rule, full and part-time employees may hold outside jobs separate from their regular employment with the Board as long as they are capable of continuing to meet the performance standards and requirements of their position with IMCS. All employees will be evaluated in accordance with the same performance standards and will be subject to the school system's ongoing scheduling demands, regardless of any existing outside work requirements. In addition, if the Board of Education determines that an employee's outside work interferes with his or her performance or ability to meet the requirements of a particular position, the employee may be asked to terminate the outside employment if he or she wishes to remain employed by the Board of Education.

All employees of IMCS are prohibited from selling, trading, distributing or dealing in instructional materials and supplies, equipment, reference books or any other services or products in IMCS except as expressly authorized in writing by the Head of School. Employees are also prohibited from supplying or furnishing the names and/or addresses of students, parents or other employees to any entity or individual engaged in such activities. Employees are further prohibited from tutoring for compensation during or outside of regular work hours students with whom they exercise teaching, administrative or supervisory responsibility or from tutoring for compensation during work

hours students with whom they do not exercise such responsibility. A parent can request written permission from the Director to waive this policy if the Director and the parent agree that the teacher involved would be the best person to tutor an individual child even though she/he is the child's classroom teacher.

Employees are prohibited from engaging in, soliciting, negotiating for or promising to accept outside employment with or render services for private interests when (1) the private interests are doing or seek to do business with the Board and the employee is or will soon be in a position to influence the business relationship either directly or indirectly, or (2) such conduct by the employee impairs the proper discharge of official Board business. Employees are further prohibited from engaging in a private business or service on Board property or using Board materials or equipment for such activities without written permission of Director.

Evaluation of employees: Employee performance will be evaluated annually.

d. Description, if the proposed charter school partners with an EMO, of the relationship that will exist between the charter school employees and the management company.

This section is not applicable to Island Montessori Charter School.

**B. QUALIFICATIONS REQUIRED FOR INDIVIDUAL POSITIONS:**

(G.S.115C-238.29F(e))

*List the qualifications and appropriate licenses that each position must have to perform the job function(s). Describe the plan to meet the licensure requirements for teachers and paraprofessionals as prescribed by state law and No Child Left Behind. If individuals have already been identified for specific positions, please provide their qualifications and/or resumes in the appendices.*

All staff at Island Montessori Charter School will:

- Share the vision of IMCS;
- Have a commitment to Montessori philosophy and respect for the child as an individual;
- Observe and prepare the environment to meet the needs of each child;
- Value and respect each individual learning style, family culture and unique gift that is shared with the community. Culturally diverse candidates will be actively encouraged to apply; and
- Successfully pass a criminal backgrounds and records check.

Licensure:

In order to meet licensure requirements as prescribed by law, a minimum of 75% of Island Montessori Charter School's Lead Teachers will hold either a valid continuing NC License that matches their teaching assignment or hold a temporary NC License while they work to complete required testing and/or coursework. Lead teachers will also be required to hold or earn Montessori Certification for the developmental level taught.

## Head of School

Description: The primary objective of the Head of School is to uphold and advance the mission and goals of Island Montessori Charter School. The Head of School will report to the IMCS Board of Directors. This person will play a key role in all aspects of ensuring a successful launch of IMCS, including but not limited to, the planning of the school, hiring of all faculty and staff, and development of the school's operational procedures. The ideal candidate will have demonstrated the ability to inspire, lead, and motivate a team to work together toward academic and financial success.

### Qualifications:

- Five+ years of experience as an Administrator of a Montessori school or comparable experience;
- Three+ years experience in education in a leadership position with excellent written and verbal communication in parent and community relations;
- Five+ years of experience teaching in a Primary or Elementary Montessori environment;
- Three+ years of experience planning, implementing, and balancing a school budget;
- Familiarity with non-profit organization and operation;
- Outstanding human resource skills;
- Basic accounting skills;
- A track record for creating collaborative, positive work environments.

### School Start-Up Responsibilities:

- Understand and share the Board's vision for IMCS and be able to galvanize the community in support of the school.
- Recruit and develop highest quality instructional staff, providing professional development consistent with the school's mission, strategic plan, teachers' instructional goals and students' learning needs.
- Establish a safe and positive school climate, maintaining staff harmony and being an advocate for the children.
- Build a strong partnership with parents and the community by communicating regularly and effectively.
- Lead the effective and efficient implementation of the educational and instructional programs in compliance with the Montessori philosophy, the school's charter, and any applicable local, state, and federal regulations.
- Manage the school's resources responsibly, including the development, implementation, and monitoring of both revenues and expenses, to assure the school remains on track fiscally, in a timely fashion, in order to recommend and take corrective action where necessary.
- Drive a culture of excellence.
- Ensure curriculum alignment with Common Core State Standards.
- Perform all other functions that are reasonable and necessary to accomplish the goals of IMCS.



### Office Manager (NCWISE/Data Manager)

Job Description: Compiles and submits to the Department of Education NCWISE information (student membership, status, and attendance); enters and maintains enrollments, withdrawals, and family demographic data in the student enrollment system; issues purchase orders for all staff and assists with purchasing when needed; coordinates working papers/files needed by Auditors prior to fieldwork; processes payables and receivables, makes bank deposits, works with outside accounting agency as needed; works with Finance Committee as needed; and functions as front desk support, maintaining general office functions.

#### Qualifications:

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

#### Education and/or Experience:

Associate's degree (A.A.) or equivalent from two-year College or technical school; or six months to one year related experience and/or training; or equivalent combination of education and experience. Experience in a school setting is helpful, but not required.

#### Computer Skills:

Must be knowledgeable of current school software and a variety of electronic tools. Must be capable of correspondence using e-mail or other web-based applications. Ability and/or willingness to learn to use and understand computer programs for spreadsheets, letters and other written communications in order to effectively communicate information for employees, administration, the Finance Committee and the Board.

### Instructional Coordinator (Assistant Principal)

Job description: Supports the mission, the Head of School, and the instructional staff and serves as a liaison between the staff and the Head of School. The Instructional Coordinator is responsible for effectively implementing and managing instruction and curriculum design, and coordinating Special Education and ELL services as needed. The Instructional Coordinator, along with the Head of School, plans and implements professional development for the teachers, coordinates field trips, and forges partnerships with community organizations and businesses.

#### Qualifications:

- Minimum of three years working in an elementary environment as a teacher, school support personnel, or school administrator
- Masters Degree, or higher, in Education
- Special Education and/or ELL certification preferred, but not required
- Montessori training (preferred but not required) and knowledge of Montessori pedagogy
- Knowledge of and experience with assessments and relevant technologies, as well as understanding of and experience in using student assessment data in instruction
- Experience in curriculum design and/or educational research
- Administrative experience preferred

- Commitment to accountability, including rigorous student testing regime

Responsibilities:

- Support the mission, the Head of School, and the instructional staff
- Serve as a liaison for communications between the staff and the Head of School
- Provide leadership in the ongoing development, improvement, and evaluation of curriculum
- Implement and manage instruction and curriculum design
- Supervise the consistent and fair administration and tracking of student conduct and discipline
- Serve as a liaison to parents and facilitate parent education and involvement
- Administration of scheduling and standardized assessments, including development of school-created assessments
- Assist in making formal reports to the Board of Directors and charter entity on student academic performance, conduct, and student data management
- Coordinate instruction and student data management (with Office Manager)
- Assist Head of School in providing professional development and coaching for teachers on instructional delivery and methods
- Coordinate field trips
- Work with Head of School on community outreach and relationship with Montessori Training programs and networking
- Identify and refer children with special needs: work with teachers on accommodations and interventions; communicate with parents and service providers, psychologist, DPI, etc.

Business Manager & Payroll Specialist

Job description: Ensure the efficient business operations, including meeting mandatory state reporting deadlines; this position works with Administration, Board Treasurer, and the assigned committees to perform the following functions:

- Ensuring that Island Montessori Charter School is prudent in obtaining adequate, competitive, and cost effective insurance and benefits to its employees
- Collects, organizes, and enters timesheets into payroll database
- Process payroll
- Ensuring an overall effective and viable human resource system
- Coordinating the entire interview and hiring process
- Preparing and monitoring the budget
- Works with Administration and the Board Treasurer to oversee the financial affairs of IMCS, including accounting and reporting procedures and long-range reporting
- Ensures all capital expenditures are appropriately recorded and coded
- Oversees Employee Policy and Procedures Manual, recommending policy adjustments as necessary

Required:

- Bachelor's Degree in Business, Public Administration, or related field
- Minimum two years successful prior business management experience (preferably in an educational environment)
- Willingness to complete Montessori paraprofessional training as a condition of employment
- High educational ethics and discretion
- Ability to professionally supervise and evaluate other professionals

- High caliber organizational skills
- Computerized accounting skills, including spreadsheets and databases
- Professional accounting and budgeting skills
- Financial strategic planning skills
- Familiarity with non-profit organization and operation
- Willingness and ability to coordinate and direct physical plant maintenance and repair

### Montessori Lead Teacher

#### Required Qualifications:

- Bachelor's Degree
- Montessori Certification (or enrolled in an accredited Montessori teacher certification program)
- Three+ years classroom teaching experience
- NC State Teaching License
- Willingness to create positive, child-centered education environment
- Professional demeanor, speech, and appearance
- High educational ethics and discretion

#### Responsibilities:

- Prepare the environment in accordance with Montessori principles
- Plan a program of study that, as much as possible, meets the individual needs, interests, and abilities of the students
- Carefully observe and keep records of each student's individual progression
- Monitor student progress, maintaining and submitting records and reports deemed necessary by IMCS
- Communicate regularly with the assistant teacher, other lead teachers, parents, and administration as required
- Develop reasonable rules of classroom behavior and procedure and maintain order in the classroom in a fair and just manner

### Assistant Teacher

The ideal size of a Montessori classroom is larger than the recommended class size in a non-Montessori program. It is not unusual for a Montessori classroom to include 24 – 30 students, balanced among three age groups. In line with the Montessori principle of cultivating independence in the child, larger class size encourages students to rely on themselves and each other. At the same time, it is vital that every student receive the individualized instruction required in a Montessori environment. Toward this end, Montessori Assistant Teachers help the Lead Teacher with administrative duties and overall classroom management, which allows the Lead Teacher to present lessons and work with individual students. Having a second adult in the classroom also helps to ensure that all children are observed and cared for.

Assistants are not required to have a teaching certification. However, IMCS is deeply committed to hiring and retaining the highest quality staff. Opportunities will be made available, and all staff will be expected to participate in ongoing professional development.

The Assistant Teacher is a guide who, while demonstrating patience and respect for the children, encourages them to be independent in activities in which they are capable of completing. S/he will assist in presenting to children activities designed to promote social, physical, and intellectual growth following the Montessori philosophy.

Desired Qualifications:

- High School Diploma with additional college coursework
- Spanish Fluency
- Prior educational experience
- Desire to obtain Montessori certification
- NC State Teaching License

Responsibilities:

- Become knowledgeable in Montessori terminology and methods
- Check student work
- Become familiar with record keeping system
- Assist with classroom management and conflict resolution
- Maintain the room and the materials

### Specials Teacher(s)

IMCS will hire teachers in the subject areas of music, fine arts, Spanish language, physical education, and environmental education. The Montessori Specialty Teacher is a guide who, while demonstrating patience and respect for children, instructs them in the subject area for which they are hired. The Specialty Teacher will follow all IMCS policies and procedures, modeling appropriate manners and behaviors. S/he will build knowledge and appreciation in their subject area for students through activities designed to promote social, physical, and intellectual growth following the Montessori philosophy.

Required:

- Bachelor's Degree
- Five+ years experience in related field (art, music, physical education, Spanish, or environmental education)
- High educational ethics and discretion
- Professional demeanor, speech, and appearance

Responsibilities:

- Establish and maintain a Montessori culture
- Plan a program of study that, as much as possible, meets the individual needs, interests, and abilities of students
- Create engaging and age appropriate lesson plans
- Establish and maintain cooperative working relationships with children, parents, and colleagues
- Monitor student progress, maintaining and submitting records and reports deemed necessary by IMCS
- Communicate with lead teacher and parents as required
- Attend staff meetings, open houses and/or other school functions, as required

**C. ENROLLMENT and BUSINESS PLAN** (GS 115C.238.29F(g)(1-7))

*1. Provide a plan indicating how the school will reasonably reflect the 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-238.29F(g)(5)).*

Enrollment for Island Montessori Charter School will mirror the demographic composition of the New Hanover County School District. In its 2011-12 Annual Report, the New Hanover County School District stated the following demographic make-up of its students:

- White: 63.5%
- Black: 23.1%
- Hispanic: 6.5%
- American Indian: 0.5%
- Asian: 1.8%
- Multi-Racial: 4.6%

These demographics will be given public access to knowledge of school enrollment procedures and admission requirements. Enrollment will be open to all students who can legally attend public school law by state law, without discrimination of ethnicity, national origin, religion, gender, intellectually ability, athletic ability, measures of achievement or aptitude, race, creed, ancestry, or disability. Students and families requiring English as a Second Language support will receive translation assistance as needed.

Island Montessori Charter School will examine student demographic data in December of each year. The school's administrative team will present the data along with recommendations and proposals to the Board. The Board will then conduct the annual evaluation and make revisions and adjustments as deemed necessary to the enrollment plan to ensure all ethnic groups are provided the same opportunity for school enrollment.

The enrollment evaluation plan will appraise the following: free and reduced lunch figures, admissions data, ongoing community surveys, and information gleaned from the Family School Association. The school will market the its programs accordingly to confirm that enrollment opportunities reflect racial, intellectual, and economic diversity. Along with this, the school will facilitate mailings, meetings, and dissemination to all regional faith-based groups, daycares, businesses, town councils, and community organizations, such as the local YMCA.

*2. Marketing to potential students and parents is vital to the survival of a charter school. 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.238.29F(g) (1-7) carefully. Describe how the board will market the school to all populations (including various community ethnic groups, teachers and other employees, and the general public) to ensure that the school fully complies with the State Statute to mirror the diversity of the local education agency.*

Island Montessori Charter School is committed to open and regular communication with all stakeholders and the public at large, according to the applicable local, state and federal laws. Utilizing a variety of communication methods to ensure all entities have access to information, the school will adhere to communications ethics and practices recommended by the National and North Carolina School Public Relations Associations as well as marketing strategies recommended by National Montessori organizations, such as American Montessori Society and North American Montessori Teachers' Association.

An annual communications plan developed by the school's communications committee will include a timeline projecting dates for development and completion of all major communication initiatives, to include, but not limited to: stakeholder focus groups and meetings, printed and electronic communications, internal communications with staff and students, and a schedule for communication with funding agencies. A schedule for regular contact with media representatives will be included.

Furthermore, Island Montessori Charter School will maintain a marketing plan that promotes diversity in enrollment and openly invites attendees from surrounding neighborhoods. The targeted population will be students from Southern New Hanover County, which includes the communities of Carolina Beach, Kure Beach, Myrtle Grove, and Monkey Junction. These demographics will be given public access to all school-related information. Students and families requiring English as a Second Language support will receive translation assistance through marketing material developed to honor those needs. Registration will be publicly announced through the means established by the school's Communication Committee and will be open to all students who can legally attend public school by state law, without discrimination of ethnicity, national origin, gender or disability. To ensure that all populations are informed, the school will employ various means of communication including an up-to-date website and the use of social media, as well as non-electronic communication through local printed media, newsletters, brochures, flyers, and speaking engagements with the public.

Partnerships with regional daycares and after-school programs will be initiatives of this school as a means to establish viable relationships with the targeted population as well as to develop an outlet for regular discourse with the community at large. The school will foster correspondence with local town councils, businesses, community organizations and social service agencies to provide wider demographic accessibility to the school. All targeted populations, therefore, will have public access to knowledge about school regulations, admission requirements, and procedures.

The school will market to qualified and accredited faculty through the use of respected online job search engines and postings on the North Carolina Department of Public website and National Montessori organizations' websites, along with connection to the University of North Carolina system and participation in regional college career services. Job descriptions will be carefully constructed to ensure teachers and staff are well informed of position expectations, including participation in staff development programs, as well as school policies, procedures, and standards.

The Head of School or his or her designee will be the authorized spokesperson for the school. These individuals will develop and maintain positive relationships with local media representatives.

The school will prepare, post on the website, and publish a comprehensive annual report that will include accomplishments, budget information, student performance data and other pertinent information.

The numbers in the following tables are projections, or estimates, and do not bind the State to fund the school at any particular level.

*For the first two years the State will fund the school up to the maximum projected enrollment for each of those years approved in the projected enrollment tables. However, in subsequent years, the school may increase its enrollment only as permitted by G.S. 115C-238.29D(d), that is, an increase of 20% per year based on the previous year's enrollment. Any increase above 20% must be approved by the State Board of Education in accordance with G.S. 115C-238D(d).*

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. In describing your budgetary assumptions, explain the analysis utilized to project these specific enrollment figures. If your budget projections are lower than anticipated, how will the school adjust this budget and what is the determined break-even point for student enrollment?

Also, in narrative format, explain how your spending priorities align with the school's mission, curricular offerings, transportation plans, and professional development needs. Be able to depict in chart format and discuss in a narrative how the school will maintain a small, contingency reserve and operate using sound fiscal practices. As you construct the budget, include any and all documentation about cash on hand, bonds, real estate, or grants as part of this application package.



**PROJECTED ENROLLMENT** 2013-14 through 2017-2018  
 IDENTIFY LEA FROM WHICH STUDENTS WILL PROBABLY COME

List LEA #1 - 204

List LEA #2 -    

List LEA #3 -    

GRADES	2013-2014			2014-2015			2015-2016			2016-2017			2017-2018		
	LEA 1	LEA 2	LEA 3	LEA 1	LEA 2	LEA 3	LEA 1	LEA 2	LEA 3	LEA 1	LEA 2	LEA 3	LEA 1	LEA 2	LEA 3
Kindergarten	<u>24</u>	—	—	<u>24</u>	—	—	<u>24</u>	—	-	<u>24</u>	—	—	<u>24</u>	—	—
First	<u>24</u>	—	—	<u>24</u>	—	—	<u>24</u>	—	-	<u>24</u>	—	—	<u>24</u>	—	—
Second	<u>24</u>	—	—	<u>24</u>	—	—	<u>24</u>	—	-	<u>24</u>	—	—	<u>24</u>	—	—
Third	<u>24</u>	—	—	<u>24</u>	—	—	<u>24</u>	—	-	<u>24</u>	—	—	<u>24</u>	—	—
Fourth	<u>24</u>	—	—	<u>24</u>	—	—	<u>24</u>	—	-	<u>24</u>	—	—	<u>24</u>	—	—
Fifth	<u>24</u>	—	—	<u>24</u>	—	—	<u>24</u>	—	-	<u>24</u>	—	—	<u>24</u>	—	—
Sixth	—	—	—	<u>24</u>	—	—	<u>24</u>	—	-	<u>24</u>	—	—	<u>24</u>	—	—

PROJECTED ENROLLMENT 2013-14 through 2017-2018 (continued)

		2013-2014			2014-2015			2015-2016			2016-2017			2017-2018		
		LEA	LEA	LEA	LEA	LEA	LEA	LEA	LEA	LEA	LEA	LEA	LEA	LEA	LEA	
		1	2	3	1	2	3	1	2	3	1	2	3	1	2	3
Seventh	7	—	—	—	—	—	—	<u>24</u>	—	—	<u>24</u>	—	—	<u>24</u>	—	—
Eighth	8	—	—	—	—	—	—	—	—	—	<u>24</u>	—	—	<u>24</u>	—	—
Ninth	9	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Tenth	10	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Eleventh	11	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Twelfth	12	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Totals	LEA	144			168			192			240			240		
Overall Total Enrollment		<u>144</u>			<u>168</u>			<u>192</u>			<u>240</u>			<u>240</u>		

**Budget: Revenue Projections 2013-14 through 2017-2018**

INCOME: REVENUE PROJECTIONS	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018
--State ADM Funds	<u>\$644,381.28</u>	<u>\$751,778.16</u>	<u>\$859,175.04</u>	<u>\$1,073,968.8</u>	<u>\$1,073,968.8</u>
--Local Per Pupil Funds	<u>\$378,974.88</u>	<u>\$442,137.36</u>	<u>\$505,299.84</u>	<u>\$631,624.8</u>	<u>\$631,624.8</u>
--Federal Funds	<u>\$51,086.28</u>	<u>\$58,384.32</u>	<u>\$69,331.38</u>	<u>\$87,576.48</u>	<u>\$87,576.48</u>
--Grants*	<u>\$</u>	<u>\$</u>	<u>\$</u>	<u>\$</u>	<u>\$</u>
--Foundations*	<u>\$</u>	<u>\$</u>	<u>\$</u>	<u>\$</u>	<u>\$</u>
--Private Funds*	<u>\$</u>	<u>\$</u>	<u>\$</u>	<u>\$</u>	<u>\$</u>
--Other Funds*	<u>\$</u>	<u>\$</u>	<u>\$</u>	<u>\$</u>	<u>\$</u>
TOTAL INCOME	<u>\$1,074,442.44</u>	<u>\$1,252,299.84</u>	<u>\$1,433,806.26</u>	<u>\$1,793,170.08</u>	<u>\$1,793,170.08</u>
<p>*If you are depending on these sources of funding to balance your operating budget, please provide documentation, such as signed statements from donors, foundations, etc., on the availability of these funds.</p>					

Budget (continued): Revenue Projections 2013-14 through 2017-2018

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

See <http://www.ncpublicschools.org/fbs/stats/index.html>  
(OR Click on: Agency Website: Division of Financial Services, Reports and Statistics, Statistical Data)

The formula for figuring these allotments can be found in the Resource Guide.

BUDGET		2013/14	2014/15	2015/16	2016/17	2017/18
Revenue	Per ADM	144	168	192	240	240
State Funds	\$4474.87	644,381.28	751,778.16	859,175.04	1,073,968.8	1,073,968.8
New Hanover Funds	\$2631.77	378,974.88	442,137.36	505,299.84	631,624.8	631,624.8
Federal Funds - 10% ADM	\$3649.02	51,086.28	58,384.32	69,331.38	87,576.48	87,576.48
<b>Total Revenue</b>		<b>\$1,074,442.44</b>	<b>\$1,252,299.84</b>	<b>\$1,433,806.26</b>	<b>\$1,793,170.08</b>	<b>\$1,793,170.08</b>

**Budget: Expenditure Projections 2013-14 through 2017-2018**  
MAY BE AMENDED AS THE NEEDS OF THE SCHOOL DICTATES

BUDGET EXPENDITURE PROJECTIONS	2013-2014		2014-2015		2015-2016		2016-2017		2017-2018	
<i>PERSONNEL</i>										
<i>Total # of staff and Projected Costs</i>	<u>#24</u>	<u>\$684,000</u>	<u>#28</u>	<u>\$809,000</u>	<u>#31</u>	<u>\$919,000</u>	<u>#36</u>	<u>\$1,154,000</u>	<u>#36</u>	<u>\$1,154,000</u>
<i>Head of School</i>	<u>#1</u>	<u>\$57,500</u>	<u>#1</u>	<u>\$57,500</u>	<u>#1</u>	<u>\$57,500</u>	<u>#1</u>	<u>\$57,500</u>	<u>#1</u>	<u>\$57,500</u>
<i>Instructional Coordinator</i>	<u>#0.5</u>	<u>\$22,500</u>	<u>#1</u>	<u>\$45,000</u>	<u>#1</u>	<u>\$45,000</u>	<u>#1</u>	<u>\$45,000</u>	<u>#1</u>	<u>\$45,000</u>
<i>Business Manager</i>	<u>#0.5</u>	<u>\$22,500</u>	<u>#1</u>	<u>\$45,000</u>	<u>#1</u>	<u>\$45,000</u>	<u>#1</u>	<u>\$45,000</u>	<u>#1</u>	<u>\$45,000</u>
<i>EC Coordinator</i>	<u>#0.5</u>	<u>\$22,000</u>	<u>#1</u>	<u>\$44,000</u>	<u>#1</u>	<u>\$44,000</u>	<u>#1</u>	<u>\$44,000</u>	<u>#1</u>	<u>\$44,000</u>
<i>Office Manager</i>	<u>#1</u>	<u>\$37,500</u>	<u>#1</u>	<u>\$37,500</u>	<u>#1</u>	<u>\$37,500</u>	<u>#1</u>	<u>\$37,500</u>	<u>#1</u>	<u>\$37,500</u>
<i>Lead Teachers</i>	<u>#8</u>	<u>\$320,000</u>	<u>#9</u>	<u>\$360,000</u>	<u>#10</u>	<u>\$400,000</u>	<u>#12</u>	<u>\$480,000</u>	<u>#12</u>	<u>\$480,000</u>
<i>Assistant Teachers</i>	<u>#8</u>	<u>\$120,000</u>	<u>#9</u>	<u>\$135,000</u>	<u>#10</u>	<u>\$150,000</u>	<u>#12</u>	<u>\$180,000</u>	<u>#12</u>	<u>\$180,000</u>
<i>EC &amp; LEP Teacher</i>	<u>#0.5</u>	<u>\$22,000</u>	<u>#0.5</u>	<u>\$25,000</u>	<u>#2</u>	<u>\$80,000</u>	<u>#2.5</u>	<u>\$105,000</u>	<u>#3</u>	<u>\$105,000</u>
<i>Spanish</i>	<u>#1</u>	<u>\$15,000</u>	<u>#1</u>	<u>\$15,000</u>	<u>#1</u>	<u>\$15,000</u>	<u>#1</u>	<u>\$40,000</u>	<u>#1</u>	<u>\$40,000</u>
<i>Music</i>	<u>#1</u>	<u>\$15,000</u>	<u>#1</u>	<u>\$15,000</u>	<u>#1</u>	<u>\$15,000</u>	<u>#1</u>	<u>\$40,000</u>	<u>#1</u>	<u>\$40,000</u>
<i>Fine Arts Teacher</i>	<u>#1</u>	<u>\$15,000</u>	<u>#1</u>	<u>\$15,000</u>	<u>#1</u>	<u>\$15,000</u>	<u>#1</u>	<u>\$40,000</u>	<u>#1</u>	<u>\$40,000</u>
<i>Physical Education Teacher</i>	<u>#1</u>	<u>\$15,000</u>	<u>#1</u>	<u>\$15,000</u>	<u>#1</u>	<u>\$15,000</u>	<u>#1</u>	<u>\$40,000</u>	<u>#1</u>	<u>\$40,000</u>
Note: Spanish, Music, Fine Arts, and Physical Education Teachers will go from part-time to full-time in 2016/17.										

Budget (continued): Expenditure Projections 2013-14 through 2017-2018

BUDGET EXPENDITURE PROJECTIONS	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018
<i>EMPLOYEE BENEFITS</i>	<u>\$201,600</u>	<u>\$235,600</u>	<u>\$283,600</u>	<u>\$379,600</u>	<u>\$379,600</u>
<i>STAFF DEVELOPMENT</i>	<u>\$1,500</u>	<u>\$3,500</u>	<u>\$5,000</u>	<u>\$5,000</u>	<u>\$5,000</u>
<i>MATERIALS AND SUPPLIES</i>	<u>\$20,000</u>	<u>\$10,000</u>	<u>\$15,000</u>	<u>\$25,000</u>	<u>\$20,000</u>
<i>OFFICE SUPPLIES</i>	<u>\$1,000</u>	<u>\$5,000</u>	<u>\$5,000</u>	<u>\$5,000</u>	<u>\$5,000</u>
<i>INSTRUCTIONAL EQUIPMENT</i>	<u>\$750</u>	<u>\$9,000</u>	<u>\$10,000</u>	<u>\$20,000</u>	<u>\$20,000</u>
<i>OFFICE EQUIPMENT</i>	<u>\$1,000</u>	<u>\$1,000</u>	<u>\$3,000</u>	<u>\$4,000</u>	<u>\$4,000</u>
<i>TESTING MATERIALS</i>	<u>\$1,000</u>	<u>\$2,500</u>	<u>\$3,000</u>	<u>\$3,500</u>	<u>\$4,000</u>
<i>INSURANCE</i>	<u>\$15,000</u>	<u>\$15,000</u>	<u>\$15,000</u>	<u>\$15,000</u>	<u>\$15,000</u>
<i>UTILITIES</i>	<u>\$21,600</u>	<u>\$21,600</u>	<u>\$25,000</u>	<u>\$27,500</u>	<u>\$27,500</u>
<i>RENT</i>	<u>\$120,000</u>	<u>\$123,600</u>	<u>\$127,308</u>	<u>\$131,127.24</u>	<u>\$135,061.06</u>
<i>MAINTENANCE &amp; REPAIR</i>	<u>\$1,000</u>	<u>\$1,500</u>	<u>\$2,000</u>	<u>\$3,000</u>	<u>\$3,000</u>
<i>TRANSPORTATION</i>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>
<i>MARKETING</i>	<u>\$500</u>	<u>\$5,000</u>	<u>\$5,000</u>	<u>\$5,000</u>	<u>\$5,000</u>
<i>FOOD/CAFETERIA</i>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>
<i>PROFESSIONAL DEVELOPMENT</i>	<u>\$5,000</u>	<u>\$9,500</u>	<u>\$15,000</u>	<u>\$15,000</u>	<u>\$15,000</u>
TOTALS	\$389,950	\$442,800	\$513,908	\$638,727.24	\$638,161.06
Net Income	\$492.44	\$499.84	\$898.26	\$442.84	\$1,008.84

**BUDGET NARRATIVE:**

*Please include additional information that showcases all assumptions for your budgetary calculations. For instance, you may start the first year with 10 teachers but plan to add 2 teachers each year. The increase may be seen in the budget; however, the specific assumptions are missing beyond the projected first year. Use this space to explain, in depth, your budget calculations for years 2 through 5.*

Island Montessori Charter School's budget assumptions and projections have been developed on the basis of extensive review of other charter school budgets and discussions with school leaders. We have done extensive research into the actual costs of funding the type of Montessori program that we propose and have spoken to school leaders at other Montessori Charter Schools, including Sterling Montessori Charter School, Casa Esperanza Montessori Charter School, and Pawleys Island Montessori, which is opening a K-6 Montessori Charter School in Pawleys Island, SC, in August 2012. We have laid out plans to operate on a balanced budget, or with a surplus. The main focus of the budget planning has been the implementation of a sound educational program, providing the staff and resources needed to accomplish our mission.

Budget Projections (Year 1 through Year 5)

Revenue

- The school assumes \$7,106.64 per pupil from state and local funds, and 0% growth in per pupil funding rate.
- The total budget will be derived from student enrollment. We have projected adding one classroom in Year 2, one classroom in Year 3, and two classrooms in Year 4. We expect to be fully enrolled by Year 4.
- The school assumes a special education population reflective of the surrounding area and expects to receive corresponding funding to meet the needs of this population, conservatively predicting that 10% of our students will receive special education services. The budget is calculated using this percentage.

Expenses

- The school has proposed competitive starting salaries and average starting salaries for all instructional staff. The school is offering a Head of School salary that is low. After the first year, the Board will evaluate the Head of School's performance and achievement of school goals to determine whether to grant an increase.
- The school intends to hire an Instructional Coordinator who will also function as the Business Manager the first year. After year one, the school intends to make both positions, Instructional Coordinator and Business Manager, separate full-time positions.
- Instructional Staff represents approximately 53% of total expenses. This is IMCS's largest expense, emphasizing a commitment to attracting and retaining high quality, professional teachers and keeping the student/teacher ratio at no more than 14:1, and maintaining two educators in each classroom.
- In the first year, the EC Coordinator will also function as the EC Teacher. After year one, the school intends to make the EC Coordinator a full-time position and will add one half-time EC Teacher (or as needed); after year two, the school intends to hire additional full-time EC and LEP teachers to meet the needs of the enrolled students.
- Assistant Teachers will work less than 30 hours a week and therefore are not eligible for benefits, which is reflected in the employee benefits line item. Specials teachers will start as part-time employees and will not be eligible for benefits until year three when those positions become full-time to accommodate the school's additional classes.
- The school's budget includes all necessary administrative and instructional staff necessary to support the school's comprehensive educational program.

Classroom set-up: Furniture and Instructional Materials

Initial set up for Montessori classrooms includes a higher cost for the purchase of special materials and furniture.

"Instructional materials" includes the amount each teacher will receive to spend as needed on classroom supplies and materials. After the first year, the school intends to allot each teacher \$1,000 a year for instructional materials.

### Professional Development

Professional development is a key element in the school design. Provisions are made in the budget for the school to sponsor training courses for new teachers. Once the school becomes an accredited Montessori teacher training site, these funds will be used to cover workshop and conference expenses, as well as ongoing professional development.

### Contingency Plan

The first, and most important, step in a contingency plan for a budget shortfall is the assurance that systems are in place to prevent this from happening, and for planning ahead in the event that it does.

Strong financial oversight measures will in place, with the Board overseeing the school's operations and the implementation of rigorous systems of internal control that prevent fraud and allow for a complete picture of the school's budget outlook. The Head of School, Business Manager, and Board Treasurer will have direct oversight of all financial procedures, record keeping, and reports in the school.

In the event of a budget shortfall, due to lower than expected enrollment, higher location expenses, or other change in the school's operating budget, steps will be taken to ensure that the educational program is not affected, and that the students continue to receive the high quality education and services that the school has committed to offering. The first step would include engaging the Board with the financial picture and accepting any of their recommendations/decisions. The Board will always have a clear, accurate and updated picture of the financial health of the school.

Other steps that will be considered, which will not affect the students and their education, include:

- The school will initiate with the Board to devise an aggressive fundraising campaign, including additional grants and fundraising events.
- The school will look closely at the administrative costs and make cuts as needed wherever possible, including reducing administrative salaries to the extent possible.
- Enrolling an additional 10% above the projected enrollment would alleviate financial pressures in the beginning term.



WORKING CAPITAL and/or ASSETS ON DATE OF APPLICATION

Cash on Hand	\$ <u>0</u>
Certificates of Deposit	\$ <u>0</u>
Bonds	\$ <u>0</u>
Real Estate	\$ <u>0</u>
Capital Equipment	\$ <u>0</u>
Motor Vehicles	\$ <u>0</u>
Other Assets	\$ <u>0</u>
TOTAL	\$ <u>0</u>

ADDITIONAL NOTES:

**SCHOOL AUDITS:**

**PROGRAM AUDITS: GS 115C-238.29B(b)(6)**

*Describe the procedure and method for evaluating the overall effectiveness of the proposed charter school program as related to the mission of the school.*

We will use several methods for auditing Island Montessori Charter School's programs, including, but not limited to the following:

- Review of state and national assessment instrument scores
- Formal review of Montessori program conducted by American Montessori Society certified School Consultant
- Annual parent satisfaction survey
- Annual faculty satisfaction survey
- Annual community member surveys
- Faculty-wide School Improvement Plan, which will include long-term planning, implementation, observation, and evaluation of achievement of identified objectives
- Individual faculty member assessments, which will include professional development and programmatic development objectives, standards, and goals
- Grade-level programmatic assessment, which will include identification of objectives, achievement objectives, and correlation with the NC Standard Course of Study objectives
- Formal, end-of-year faculty meeting convened specifically to review and evaluate programmatic achievements, as well as plan for next school year goals
- Formal beginning-of-year faculty meetings convened specifically to review and evaluate past achievements, as well as introduce new goals

**FINANCIAL AUDITS: GS 115C-238.29F(f)(1)**

*Describe the procedure and method for conducting an independent financial audit for the proposed charter school. Give the name of the firm approved by the NC Local Government Commission (GCC) that will conduct the audit. Include the complete mailing address, telephone number and fax number.*

The Board of Directors of Island Montessori Charter School will solicit bids from the following vendors to conduct a financial audit on an annual basis. The Request for Proposal (RFP) will be prepared and disseminated to potential vendors no later than April 1, 2013 with approval of a vendor no later than August 1, 2013. At that time it will be submitted to the LGC.

Thomas Robert, Jr. CPA  
3801 Cherry Avenue  
Wilmington, NC 28403  
(910) 799-6382

McGladrey  
300 N. 3<sup>rd</sup> St., 5<sup>th</sup> Floor  
Wilmington, NC 28401  
(910) 762-9623

Bearman CPA  
2609 Wrightsville Avenue  
Wilmington, NC 28403  
(910) 508-630

## CIVIL LIABILITY AND INSURANCE

State the proposed coverage for:

Comprehensive General Liability	\$1,000,000 per occurrence
Officers and Directors/Errors and Omissions	\$1,000,000 per occurrence
Property Insurance	Appraised Value of Island Montessori site and contents
Motor Vehicle Liability	N/A
Bonding	\$250,000
Minimum amount:	\$250,000
Maximum amount:	\$250,000
Other	Worker's compensation – per established rate

*If you, as an applicant, have already received quote from an insurance organization, please provide a copy within the appendices.*

*See Resource Manual for Minimums allowed by SBE Policy.*

### **TRANSPORTATION** (G.S. 115C-238.29F(h))

*Describe in detail the transportation plan that will ensure that no child is denied access to the school due to lack of transportation.*

Island Montessori Charter School will make a good faith effort to ensure transportation is not a barrier to attendance for any student. Students enrolled at IMCS will be transported to and from school primarily by private vehicle or carpool. All parents are asked to provide transportation to and from school. Neighborhood car pools are encouraged, and parents who provide carpool services for families unable to reciprocate may apply driving time to their parent volunteer requirement. IMCS's transportation plan is to provide a means for parents to generate their own carpool connections if transportation is an issue. A student's parent(s) or legal guardian is ultimately responsible for transportation to and from IMCS.

**FACILITY** (GS 115C-238.29D(c))

*Describe the facility in which the school will be located. Include information on how the site is appropriate to your structural program. 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 facility and has provided a valid Certificate of Occupancy for Educational use to The Office of Charter Schools.*

Name of the facility (if known): \_\_\_\_

Address: \_\_\_\_

City/State/Zip: \_\_\_\_

Description of the Facility:

Total square feet: \_\_\_\_  
Number of Classrooms: \_\_\_\_  
Number of Restrooms: \_\_\_\_

Other Rooms:

Auditorium: \_\_\_\_  
Gymnasium: \_\_\_\_  
Music Room: \_\_\_\_  
Art Room: \_\_\_\_  
Laboratory: \_\_\_\_

Ownership:  Fee Simple or  Lease

If the facility is to be leased, provide the following information:

- (a) Term of the Lease: \_\_\_\_
- (b) Type of Lease: \_\_\_\_
- (c) Rent: \$ \_\_\_\_ per month

Name of Landlord: \_\_\_\_

Address: \_\_\_\_

City/State/Zip: \_\_\_\_

Phone: \_\_\_\_ Fax: \_\_\_\_

Document inspections for the following:

- (a) Fire: \_\_\_\_
- (b) Safety: \_\_\_\_
- (c) Handicapped accessibility? \_\_\_\_

Describe how the maintenance will be provided for the facility.

Describe the method of finding a facility if one is not readily available at this time including information about the spatial needs of the school to best suit your adopted educational program and instructional methodologies. Does the applicant have a facility contingency plan should their initial efforts not be successful?

The ideal facility will be centrally located in Southern New Hanover County in a site that will make the school visually and physically accessible to the diverse population IMCS will serve. IMCS seeks a facility with large, high-ceilinged spaces abundant in natural light and with ample outdoor space. The Board will consider leasing space from a local church should its initial efforts to find appropriate vacant sites for the school are not successful.

The facility will be upgraded to meet all fire, safety and building codes and will be fully ADA accessible. The facility and site will meet all city, district, and state standards for schools.

Much like Sterling Montessori Charter School and Casa Esperanza Montessori Charter School, the Kindergarteners will be in a Primary Class, which serves children ages 3 to 6. The Primary Classes will begin August 2012 as part of a private Montessori school, Island Montessori School, which will be located at 222 Winner Avenue, Carolina Beach, NC. This facility was built in 2000 to function as a child care center. The 4,440-square foot building has four classrooms, each equipped with its own bathrooms, which have child-sized sinks and toilets. There are vacant properties on either side of the preschool building, and IMCS intends to pursue the possibility of purchasing either of the lots when funds are available to develop a new school facility to house IMCS, grades 1 through 8.

#### **HEALTH AND SAFETY REQUIREMENTS** (G.S. 115C-238.29F(a))

*Describe how the school plans to adhere to the requirements of the health and safety laws and regulations of the federal and state governments. Address how the proposed charter school will meet the following requirements:*

**Safety:** Visitors will have to sign into and out of the school and will be issued a nametag upon arrival. Individuals who have parental permission to remove a child from campus will be required to present ID unless they are known to the faculty and are on the child's approved pick-up list. IMCS will meet health and safety requirements of the state board of education. The Head of School and Instructional Coordinator will be responsible for monitoring school safety, perform background checks on all teachers and staff members, and for compliance with state and local safety standards.

**Immunization of Students:** All children entering kindergarten will be required to present documentation of required immunizations prior to the first day of school, unless they have a documented medical or religious exemption. The Head of School checks immunization records yearly. The staff will identify or other designated staff member will check students with outstanding shots and if the child is not immunized within a specified amount of time, will notify families that the child will be unable to return to school until immunizations are complete.

**Fire and Safety Regulations:** Fire drills will be conducted every month, and twice within the first ten days of school. Inspections by the local fire department will be conducted bi-annually. Faculty will be notified in writing concerning evaluation of the schoolhouse for fire hazards and will be provided with a method of requesting repair, if required. Children will be taught basic fire safety skills for school and at home. Severe weather drills will occur within the first ten days of school, and prior to May 1st every year.

**Food Inspections:** (Not Applicable)

**Hazardous Chemicals:** IMCS will make every effort to use non-toxic, biodegradable and/or Green Seal certified cleaning supplies. When any hazardous chemicals are present, they will be kept under lock and key and be disposed of according to law and local regulation. The contact number for poison control will be posted in each classroom and in the office. A binder containing Material Safety Data Sheets (MSDS) will contain proper handling information for all materials on hand.

**Blood-borne Pathogens:** Staff will be required to learn basic safety procedures for contact with hazardous chemicals through a required course in first-aid. Instructors are available from the local Fire and Rescue or EMS. Staff will be required to wear appropriate personal protective gear when in contact with human blood and body fluids. Students will be discouraged from administering first aid to one another.

**Diabetes care plans:** Students identified as having diabetes should be covered under a 504 plan, which should be implemented by teachers, the Director, and any volunteers working with such students. The following form, obtained from the American Diabetes Association (ADA Position Statement, "Care of Children with Diabetes in the School and Day Care Setting." (Diabetes Care, Volume 25, Supplement 1, January 2002)) will be filled out as a cooperative effort between parents and students. Teachers will abide by the information and instruction set forth in the Plan. The Plan may be revisited should any party request a change in the plan.

Providing students in grades 9-12 with information on how a parent may lawfully abandon a newborn:  
(Not applicable)

Providing parents and guardians with information about:

- Meningococcal meningitis and influenza and their vaccines at the beginning of each year: IMCS will provide information to parents about meningococcal meningitis and influenza in the month of August. The information will include the causes, symptoms and how meningococcal meningitis and influenza are spread.
- Cervical cancer, cervical dysplasia, human papillomavirus, and the vaccines available to prevent diseases: IMCS will provide information about cervical cancer, cervical dysplasia, HPV and the vaccines to prevent these diseases to students in the month of August to grades 5-8. The information will include the causes, symptoms and how they are transmitted and how they can be prevented.

## **V. LEA IMPACT STATEMENT**

Pursuant to G.S. 115C-238.29B(d), the charter school applicant must submit a copy of the application to the LEA in which the school will locate within seven days of the submission of the application to the Office of Charter Schools. Applicants are encouraged to submit their application to the LEA first so that proof of submission can be included in the complete application packet. The LEA may then submit information or comment directly to the Office of Charter Schools for consideration by the State Board of Education.

Please attach to this application a return receipt, or other documentation, verifying the applicant's timely submission of a copy of this application to the LEA.