

## 1.4 Performance Management

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### 14 Del. C. §§ 512(4)-(7)

The DDOE will evaluate every charter school's performance annually and for renewal purposes according to a set of academic, financial, and organizational performance standards, known as the Charter Performance Framework, which will be incorporated into the Performance Agreement. (**Note!** The Performance Agreement is enforceable as part of the school's Charter Contract.)

- The academic performance standards will be in accordance with 14 *Del. C.* § 512(4) and will consider status, growth, and comparative performance based on federal, state, and school-specific measures.
  - The financial performance standards will be based on standard accounting and industry standards for sound financial operation.
  - The organizational performance standards will be based primarily on compliance with legal obligations, including the fulfillment of the Board's fiduciary obligations related to sound governance.
  - The Charter Performance Framework may be found [here](#):
  - Guidance Documents for the Delaware School Success Framework (DSSF), Organizational Performance Framework and Financial Performance may be found [here](#).
1. Explain how the school's Board and School Leadership Team will measure and evaluate the academic progress of individual students, student cohorts, and the school as a whole throughout the school year, at the end of each academic year, and for the term of the charter contract.

SMS will track students' growth and proficiency in ELA, mathematics, science, and social studies as described below.

SMS will open with children in grades K-3<sup>rd</sup> grade. This will require that we have adequate performance assessments to monitor children's progress prior to their first state assessments. The school will follow a timeline for formative and summative assessments reflected in the tables below.

**ELA formative and summative assessments will be administered on the following timeline:**

<b>Language Arts Data Collection Timeline for Summative Assessments</b>			
The following assessments are summative assessments that document children’s progress over longer periods of them. They are administered at the beginning, middle, and end of the school year.			
<b>DIBELS</b> - Letter Naming Fluency, Phoneme Segmentation, Nonsense Word Fluency, Retell Fluency and Oral Reading Fluency (Kaminski, Good, Smith, & Dill, 2003). <b>TROLL</b> – (Dickinson, McCabe, & Sprague, 2003). <b>Developmental Reading Assessment Text Levels and Word Analysis.</b> (Beaver & Carter, 2003) <b>Writing Samples – DDOE writing rubrics</b> <b>Spelling Inventory – Words Their Way</b>		<b>DIBELS</b> - Letter Naming Fluency, Phoneme Segmentation, Nonsense Word Fluency, Retell Fluency and Oral Reading Fluency (Kaminski, Good, Smith, & Dill, 2003).  <b>Developmental Reading Assessment Text Levels and Word Analysis.</b> (Beaver & Carter, 2003) <b>Writing Samples – DDOE writing rubrics</b> <b>Spelling Inventory – Words Their Way</b>	
	<b>Fall</b>	<b>Winter</b>	<b>Spring</b>
<b>Kindergarten</b>	DIBELS Writing Assessment	DIBELS DRA (Developmental Reading Assessment) Spelling Inventory Writing Assessment	DIBELS DRA (Developmental Reading Assessment) Spelling Inventory Writing Assessment
<b>Grade 1</b>	DIBELS DRA (Developmental Reading Assessment) Spelling Inventory Writing Assessment	DIBELS Spelling Inventory Writing Assessment	DIBELS DRA (Developmental Reading Assessment) Spelling Inventory Writing Assessment

**Mathematics Formative and Summative Assessment Schedule:**

Common Core Domain	Third Period of Montessori Lesson: Observation		TERC Investigations3/ Connections (6 <sup>th</sup> grade)			DIBELS Math 3 time a year
	Anecdotal Records	Journals	Assessment Checklists	Portfolios	Embedded Benchmark Assessments	
<b>Mathematics Processes and Proficiencies</b>	X	X	X	X	X	
<b>Counting and Cardinality</b>	X	X	X	X	X	X
<b>Numbers and Operations in Base 10</b>	X	X	X	X	X	X
<b>Numbers and Operations Fractions</b>	X	X	X	X	X	
<b>Operations/Algebraic Thinking</b>	X	X	X	X	X	X
<b>Geometry</b>	X	X	X	X	X	X
<b>Measurement and Data</b>	X	X	X	X	X	X

Science: Sussex Montessori School has a memorandum of understanding with the Delaware Science Coalition, and will use assessments described on the DSC website: <https://www.doe.k12.de.us/Page/513>

Social Studies: Sussex Montessori School has a memorandum of understanding with the Social Studies Coalition of Delaware, and will use assessments such as those listed on the SSCD website: <http://www.sscde.org/lessons/search.asp>

Data will be reviewed for individual students, and cohorts will be analyzed with aggregated data for individual classrooms and for the following demographic groups:

- All students
- American Indian/Alaska Native
- African American
- Asian
- Hawaiian/Pacific Islander

- Hispanic
- White
- Multiracial
- English Learners
- Students With Disabilities
- Students who are Economically Disadvantaged

Performance data will be shared with parents, teachers and the Board to determine areas of success and needed improvement. This data, collected over time, will be provided to DDOE as a part of the charter contract.

- 2. Explain how the school will collect and analyze student academic achievement data, use the data to refine and improve instruction, and report the data to the school community. Identify the person(s), position(s), and/or entities that will be responsible and involved in the collection and analysis of assessment data.**

SMS teachers will collect data on student performance through the use of standardized assessments described above. In addition, journals, observational notes, and student work will be collected for baseline information, and for formative progress and summative data. SMS's Head of School and Education Director will aggregate, analyze, and distribute the information on academic performance. All information will be used to inform professional development to improve curriculum content, delivery, and application within the Montessori setting, and teacher classroom management. Summative assessments will be used to demonstrate a students' progress in both their personalized educational plans and in comparison to peers.

- 3. Describe the corrective actions the school will take, pursuant to 14 Del. C. § 512(5), if it falls short of student academic achievement expectations or goals at the school-wide, classroom, or individual student level. Explain what would trigger such corrective actions and who would be responsible for implementing them.**

Each year, the Head of School will participate in a full-day review of student achievement with teachers and support staff to discuss the academic performance of the school based on the aggregated data from standardized assessments and other data (classroom observations, discipline data, etc.) to determine the needs of the school for improving school-wide performance. This includes understanding the assessment data, how the information aligns with the approach of the Montessori Method, and if there are additional needed materials, professional development for teaching staff, or services for students. The outcome of this review will inform the development of the budget for improving student performance in the upcoming school year. The head of school and staff will also discuss and set targets to be achieved for the following year based on the Delaware School Success Framework.

The information from this review will be provided to the SMS Operational Board by the Head of School. If the school continues to perform poorly through a subsequent year, the Board will address the issue through the School Leader's and Educational Director's performance reviews, by reviewing and/or amending expectations of teacher quality and performance, and in appraising operational management of the school and the delivery of needed resources to the classroom. This will include whether the pedagogic approach needs to be modified to address how student performance can meet state assessment targets. If by the third year, student performance has not improved, the Board will address the operational and leadership approach of the school and determine what changes are needed.

In the case of a particular teacher having unmet achievement goals for students, the Head of School will meet with the teacher to develop an improvement plan for the area(s) in question and a plan for monitoring student progress in those areas more closely. If the teacher does not meet improvement goals in the agreed upon time frame, the Head of School will determine what change is needed.

**4. Describe how state data systems will be used and monitored to support informed decision-making in the areas of academic performance, organizational management, and financial viability. Include any coordinated professional development intended to sustain these processes.**

SMS will utilize the tools on the Delaware System of Student Assessments (DeSSA) portal applications, including the Online Reporting System. SMS will align its assessment application schedule to the State schedule.

SMS will also utilize the First State Financials system as its accounting system and PHRST as its payroll accounting system. These tools will provide on-demand reports (which will be used weekly, monthly, and yearly) for continuous assessment of the financial status of the school. It will also be used to assist with budgeting and reviewing projections for long-term financial planning. The information will be shared monthly with the Operating Board and the Citizens Budget Oversight Board.

Lastly, the school will utilize E-School as its primary source of information on students, including enrollment, attendance, demographic data, tracking of student address (particularly important in serving transient student populations) and for the application of the unit count system. This information will supply enrollment information for the purposes of establishing the budget.

School employees will participate in on-going technical assistance sessions provided by DOE and others to ensure appropriate competence in managing data and its application.

Financial goals will be reviewed as indicated in the table in the response to question #5 below. Financial goals are as follows:

- 1a. **Current Ratio (Working Capital Ratio):** Current Assets divided by Current Liabilities is greater than 1.1—OR— is between 1.0 and 1.1 and one-year trend is positive
- 1b. **Unrestricted Days Cash: Unrestricted Cash divided by (Total Expenses/365)** is 60 or more—OR— is between 30 and 60 and one-year trend is positive
- 1c. **Enrollment Variance:** Actual Enrollment as of September 30 divided by Enrollment Projection in Board-Approved Budget as of the previous July 1 meets or exceeds planned enrollment in most recent year—OR— actual enrollment equals or exceeds 95% of planned enrollment in most recent year and equals or exceeds 95% over each of the last three years
- 1d. **Default:** School is not in default of loan covenant(s) and/or is not delinquent with debt service payments
- 2a. **Total Margin:** Aggregated three-year total margin (net income divided by total revenue) is positive and the most recent year total margin is positive—OR— aggregated three-year total margin is greater than -1.5% and the trend is positive for the last two years and the most recent year total is positive
- 2b. **Debt to Asset Ratio:** Total Liabilities divided by Total Assets is less than 0.90
- 2c. **Cash Flow:** three-year cumulative cash flow is positive and cash flow is positive each year—OR— three-year cumulative cash flow is positive, cash flow is positive in two of three years, and cash flow in the most recent year is positive
- 2d. **Debt Service Coverage Ratio:** (Net Income + Depreciation + Interest Expense)/(Principal and Interest Payments) is equal to or exceeds 1.1
- 3a. **Reporting and Compliance:** The school materially complies with applicable laws, rules, regulations and provisions of the charter relating to financial reporting requirements, including but not limited to:
  - Complete and on-time submission of financial reports, including annual budget, revised budgets (if applicable), periodic financial reports as required by the authorizer, and any reporting requirements if the board contracts with an education service provider, pursuant to Del. C., Title 14, Ch. 5, §512 (14)
  - On-time submission and completion of the annual independent audit and corrective action plans, if applicable
  - If applicable, Memorandum of Understanding to operate outside the State's pension and/or benefits systems, pursuant to Del. C., Title 14, Ch. 5, §512 (9)
  - All reporting requirements related to the use of public funds

- Adherence to the policies and procedures of the First State Financial Management System, pursuant to Del. C., Title 14, Ch. 5, §512 (9)
- A Citizen Budget Oversight Committee, pursuant to (14 Del. C. §1508 and 14 DE Admin. Code 736)
- A clean audit opinion without material exceptions
- An audit that does not include an on-going concern disclosure in the notes or an explanatory paragraph related thereto within the audit report

**5. Describe how the School Leadership Team will oversee and monitor compliance with statutory requirements as measured by the Organizational Framework. Include any additional organizational goals and targets that the school will have. State the goals clearly in terms of the measures or assessments that the school plans to use.**

The school leadership team and SMS Operational Board will use the Organizational Framework to monitor all areas of the school's performance. Board Committees will be developed to focus on each area of the Organizational Framework including student achievement, financials, enrollment, the education program, and human resources. Monthly board meeting will devote time to specific areas of the Organizational Framework and progress related to the specific areas that have been identified for detailed monitoring. Specifically, particular areas of the Organizational Framework will be monitored as outlined in this chart:

<b>Organizational Framework Area</b>	<b>Accountable Staff/ Board Committee</b>	<b>Reports to the Board:</b>
Student Progress, Overall Student Achievement, proficiency of subgroups in math and reading	Education Director Head of School Teachers	Reports timed with DeSSA assessment results
Financial Performance including: current ratio, unrestricted cash, cash flow, debt service, contracts with service providers	Head of School Board Finance Chair Board Finance Committee	Monthly financial reports Annual Audit Report
Enrollment and Marketing reports - ensure that the school complies with all policies and practices related to admissions, lottery, wait lists and recruitment. Monitors school's attendance goals.	Board Committee Head of School	Monthly report to the board
Compliance with Legal requirements for educational program for students with disabilities	Leadership Team – Head of School, IST Team, and Education Director	Annual Report to Board about compliance issues and areas to be addressed

Record Maintenance – Student, Personnel, and other records are maintained and accessed according to privacy guidelines. Maintains staff credentials and CBC records.	Head of School Education Director	No reporting required unless there is an issue
Management of service contracts	Head of School Finance Committee	Reporting as needed for board approval according to bylaws.
Governance – review of bylaws, hold elections for board offices and positions	Executive Board – Meets by-monthly	Annual review of bylaws Annual election process Annual signing of conflict of interest statement
Facilities, grounds, transportation, nursing, food services, fire codes, certificates of occupancy, insurance	Board Committee Head of School	Meets Monthly and provides a monthly report to the Board.
Performance Goals – HOS	Board Chair and Executive Committee complete performance review of Head of School annually	Provides confidential annual report to Board

Organizational goals are as follows:

## Education Program

### 1a. Mission

The metrics for this standard will be defined in an annual conversation between each school and the authorizer sometime between September and March in the year preceding the school year to be reviewed in the Performance Framework. We expect that all or part of this assessment will include the National Center for Montessori in the Public Sector Essential Elements Rubric (<https://www.public-montessori.org/smarter-tools/#tools>), referenced below.

### 1b. State and federal requirements pertaining to the education program

The school is materially fulfilling applicable state and federal requirements including:

- Meeting state requirements on instructional minutes;
- Meeting state requirements for graduation and promotion in accordance with [14 DE Admin. Code 505](#) and [Del. C., Title 14, Ch. 1, II](#);
- Meeting Delaware content standards and state program requirements in accordance with [14 DE Admin. Code 500](#);
- Administering state assessments as required by Delaware law and [14 DE Admin. Code 100](#) and [Del. C., Title 14, Ch. 1, IV](#);



- Implementing a system of Response to Intervention (RTI) in accordance with the charter as well as [14 DE Admin. Code Title 14 Ch. 12](#);
- Implementing mandated programming in accordance with the terms of state and federal grants, as applicable; and
- Implementing mandated programming in accordance with the conditions and assurances for federal funds, as applicable.

#### **1c. Legal responsibilities for students with disabilities (SWDs)**

Consistent with the school's status and responsibilities as a Local Education Agency (LEA), the school materially complies with applicable laws, rules, regulations, and provisions of the charter relating to the education of students with identified disabilities and those suspected of having a disability (including the [Individuals with Disabilities Education Act](#) (IDEA), [Section 504 of the Rehabilitation Act of 1973](#), and the [Americans with Disabilities Act](#)), including requirements for:

- Identification and referral;
- Access to the school's facilities and programs for students and parents in a lawful manner and consistent with students' abilities;
- Operational compliance to include the academic program, assessments, and all other aspects of the school's program and responsibilities;
- Implementation of student Individualized Education Plans (IEPs) and Section 504 plans; and
- Discipline, including due process protections, manifestation determinations, and other identified state and federal requirements.

#### **1d. Responsibilities for English Learners (ELs)**

Consistent with the school's status and responsibilities as an LEA, the school materially complies with applicable laws, rules, regulations, and provisions of the charter relating to the education of students identified as English Learners ([U.S. Department of Education/Office of Civil Rights](#), Title III of the [Every Student Succeeds Act \(ESSA\)](#), and [Del.C., Title 14 Section 900 Special Populations, 920 Educational Programs for English Language Learners](#)), including requirements for:

- Policies for serving EL students and properly identifying students in need of EL services;
- Access to the program for students and parents as required by law and consistent with students' abilities;
- Operational compliance, including the academic program, assessments, and all other aspects of the school's program and responsibilities;
- Provision of student EL services;
- Implementation of accommodations on assessments; and
- Exit of students from EL services and ongoing monitoring of exited students.

### **Governance and Reporting**

#### **2a. Essential governance and public stewardship responsibilities**

The school materially complies with applicable laws, rules, regulations, and provisions of the charter relating to governance by its board including but not limited to:

- Board composition and membership requirements, pursuant to [Del. C., Title 14, Ch. 5, §512 \(1-2\)](#);
- Board policies, including those related to oversight of a management organization, if applicable, and including but not limited to: Board bylaws, state open meeting laws, Articles of Incorporation, and State Code of Conduct pursuant to [Del. C., Title 29, Ch. 100, Del. C., Title 14, Ch. 5, §512 \(14\)](#), and [Del. C., Del. C., Title 14, Ch. 5, § 504 Corporate status](#);
- Board training as required by statute, pursuant to [Del. C., Title 14, Ch. 5, §512\(15\)](#) and [Del. C., Title 14, Ch. 18, §1803](#);
- Citizen Budget Oversight Committee (CBOC) regulations and training as required by statute, pursuant to [Del. C., Title 14, Ch. 15, Del. C., Title 14, Ch. 15 §1508](#), and [14 Del. Admin. Code 736](#);
- Conflicts of interest, paperwork, and processes pursuant to [Del. C., Title 29, Ch. 58, §5805](#); and
- Conduct of meetings and other business in accordance with the requirements of [Del. C., Title 29, Ch. 100](#).

## **2b. Oversight and evaluation of school management**

The school materially complies with applicable laws, rules, regulations, and provisions of the charter relating to oversight of school management, including:

- Ensuring the leadership carries out the school plan for evaluating student and school performance pursuant to [Del. C., Title 14, Ch. 5, §512 \(5\)](#);
- Annually evaluating management according to state-approved criteria, if applicable, pursuant to [Del. C., Title 14, Ch. 12, §1270](#) and [14 Del. Admin. Code 108A](#); and
- (For schools contracting with Education Service Providers) Overseeing and maintaining authority over management, holding it accountable for performance as agreed under a written services agreement, and requiring annual financial reports of the education service provider pursuant to [Del. C., Title 14, Ch. 5, §512 \(14\)](#).

## **2c. Reporting requirements**

The school materially complies with applicable laws, rules, regulations and provisions of the charter relating to relevant reporting requirements to the school's authorizer, state education agency, district education department, and/or federal authorities, including:

- All state and federal reporting requirements pursuant to [Del. C., Title 14, Ch. 5, §513](#); and
- Reporting requirements related to conditions placed on the charter.

**Students and Staff****3a. Protection of the legal rights of all students**

The school materially complies with applicable laws, rules, regulations, and provisions of the charter relating to the rights of students, including:

- Policies and practices related to admissions, lottery, waiting lists, fair and open recruitment, and implementation of preferences, enrollment (including rights to enroll or maintain enrollment);
- Security and access to student records under the Family Educational Rights and Privacy Act and other applicable authorities;
- Access to documents maintained by the school under Delaware’s Freedom of Information Act and other applicable authorities;
- Transfer of student data to DDOE pursuant to [Del. C., Title 14, Ch. 5, §512 \(13\)](#);
- Due process protections, privacy, and civil rights; and
- Conduct of discipline and attendance pursuant to [Del. C., Title 14, Ch. 5, §512 \(11\)](#), including discipline hearings, suspension, and expulsion policies and practices. (Note: Proper handling of discipline processes for students with disabilities is addressed more specifically in Section 1.c.)

**3b. Requirements on staff certification and hiring**

- The school materially complies with applicable laws, rules, regulations, and provisions of the charter relating to state certification requirements and background checks in accordance with [Del. C., Title 14, Ch. 5, §507 \(c\)](#), 14 Del. [Admin. Code 745](#), and [14 Del. Admin. Code 275, 12](#).

**Facilities, Transportation, Health, and Safety****4a. Facilities, transportation, health and safety requirements**

The school materially complies with applicable laws, rules, regulations, and provisions of the charter relating to the school facilities, grounds, transportation, safety, and the provision of health-related services pursuant to [Del. C., Title 14, Ch. 5, §512 \(12\)](#), including:

- Fire inspections and related records including the requirements of [Del. C., Title 29, Ch. 82, § 8237](#);
- Viable certificate of occupancy or other required building use authorization;
- Documentation of requisite insurance coverage pursuant to [Del. C., Title 29, Ch. 29](#);
- Provision of student transportation in accordance with [Del. C., Title 14, Ch. 5, §508](#) and 14 [Del. Admin. Code §1150](#);
- Required nursing services and dispensing of pharmaceuticals 14 [Del. Admin. Code 800 regulations](#);
- Provision of a no- or low-cost breakfast or lunch under a [federal national school breakfast or lunch program](#) in compliance with [State Regulations](#)—only applicable to schools utilizing SNAP/TANF; and
- Emergency management plan as required Del. C., [Title 29, Ch. 82, § 8237](#).

- 6. Describe any mission-specific academic goal(s) that the school plans to use. State your mission-specific goal(s) clearly in terms of the measure(s) to be used, the rationale(s) for each measure, and the targets that you plan to use to assess student academic performance against these goals. (Note! mission-specific goals are optional unless you are proposing to serve students at-risk of academic failure.)**

The mission of the Sussex Montessori School (SMS) is to nurture the development of empathetic, collaborative, persistent and innovative global and community citizens in accordance with the time-tested philosophy of Maria Montessori. Accordingly, a mission-specific goal is to ensure that Sussex Montessori School provides an authentic Montessori education.

This goal will be monitored by the leadership team and the Board using the National Center of Montessori in the Public Sector's [Rubric of Essential Elements of Montessori Practice in the Public Schools](#). The rubric provides a set of descriptors that can assist SMS in determining how well it is implementing a Montessori program. The rubric addresses, 1) the Montessori adults, including qualifications for teachers, recruitment strategies, and preparation of assistant teachers, 2) the Montessori Learning Environment, including mixed-age groupings, the Montessori scope and sequence, specialty programs, uninterrupted work periods, fully equipped classrooms, student choice, access to real-world activities, and integration of the Montessori curriculum with CCSS, state standards, ELL and Special Education students, 3) family engagement including home/school partnership, parent education, a home-school association, 4) Leadership and Organizational development including credentials of school leadership, vision, membership in Montessori professional organizations, and 5) assessment including measures of academic achievement and

alternative measures of executive functions, observation and qualitative assessment, classroom-based assessment, and student self-assessment.

This rubric will be used by the school leadership, teaching teams, and the Board to continually evaluate and refine the practices at SMS to ensure delivery of a high-quality Montessori program.

- 7. If you are proposing to serve students who are at-risk of academic failure, pursuant to 14 DE Admin. Code § 275.4.2.1.5, describe the expected performance of each student on the State’s mandatory assessments in each grade during the initial charter period and what, if any, portion of the Performance framework (see link below) shall or shall not apply to the school, or shall be modified to more appropriately measure the performance of the school. (Note! Applicants proposing to serve students who are at-risk of academic failure are required to have one or more mission-specific goals.)**

Since SMS is not proposing to predominantly serve students who are at-risk of academic failure, this is Not Applicable.

<http://www.doe.k12.de.us/cms/lib09/DE01922744/Centricity/Domain/151/CharterPerfFramework.pdf>