



Creating Communities of Learners

**Feasibility Report for Establishing a Montessori  
Elementary School in Sussex County**

**September 2016**

**Montessori Works**

## **Feasibility Report for Establishing a Montessori Elementary School in Sussex County**

Disclaimer: This Feasibility Report reflects considerations early in the process of review on the feasibility and viability of a charter school in Sussex County. Prepared in September 2016, it does not necessarily reflect all final considerations included in the Charter School Application submitted in December 2016. Data collected in this report was used to inform the decisions for the December 2016 submission.

## I. Introduction

### a. Objective:

It is the objective of Montessori Works to establish a public charter Montessori school in western Sussex County for children in grades K-6, with the possibility of creating an additional preschool for children ages 3 to 6 years. Sussex County in general and western Sussex County in particular, have fewer public elementary schools per capita than the remainder of the state. Sussex also has higher poverty rates, greater diversity in population and less access to early learning models than the remainder of the state.

For the purposes of this report, we are calling the school “Sussex Montessori”. We will require an official working name for the purposes of the application.

### b. Why the Montessori Method?

For the purposes of the feasibility study, we will not go into to great detail regarding the benefits of the Montessori Method; we will reserve a more extensive discussion for the application. Briefly, Montessori provides a unique choice for students in Sussex County through a holistic, personalized approach to learning for a diverse student population. Montessori students, achieve the outcomes highlighted in Delaware’s Vision 2025. They are confident, intrinsically motivated, persistent, adaptable, collaborative, responsible, creative, and academically well prepared. They emerge more than ready for whatever is next in their lives: college, the workforce, or community service.

Learning is tailored to the child’s learning pace and focuses on all aspects of the child’s development: intellectually, physically, and psychologically. Montessori allows the child to explore the world while learning. Most important, Montessori learning is effective for all types of social backgrounds. In fact, students learning through the Montessori method in public schools have demonstrated higher scores on standardized test and have higher graduation rates than their traditional public school peers. This is an important distinction given the social and economic demography of western Sussex County.

Montessori education is one of the few approaches that is aligned from birth to age 18. Currently, the state of Delaware is focused on aligning education from birth to third grade. Montessori learning should ideally start no later than age 3 and progress as the child develops. Research demonstrates that aligned early learning programs from age 3 through elementary school years increase the likelihood that learning gains in an early childhood setting will continue to develop into the elementary years. In other words, the issues of “fade out” are greatly reduced. The Center for the Study of Educational Policy report on aligning best practices identifies the following short term benefits of aligned approaches to early learning: higher achievement test scores, reduced need for special education services, and lower retention rates. Long-term benefits include higher graduation rates a Montessori outcome noted earlier.

### c. Need for Educational Opportunities in Sussex County

There are fewer educational opportunities in Sussex County than in the remainder of the state. According to the Delaware Department of Education, there are currently fewer public pre-K, kindergarten and elementary schools in Sussex County than in Kent and New Castle County. In addition, there is only one charter school in Sussex County, which serves middle school and high school students.

There are currently 85 licensed private day care, pre-K and other forms of pre-school services with student capacities of 12 or more in the County, with another XXX licensed day care providers with capacities smaller than 12 students. Most of these are centered in town and city areas.

According to the Rodel Foundation Assessment of Public Education (2015-2016), studies have found a range of \$4-\$9 in returns for every dollar invested in high-quality early learning programs for low-income children. This bodes well for Sussex County considering the projected rapid growth in children 0-9 years of age over the next 20 years.

As noted above, an ideal Montessori School in Sussex County would begin at age 3. However, current charter school funding in Delaware limits this opportunity. Therefore, Montessori Works is interested in creating a public charter school for children kindergarten age through grade 5 for students in western Sussex County with an ongoing goal to increase the opportunities for Montessori for preschoolers in the area. With over 35,000 school children between the ages of 0-14 years, there is an opportunity to sufficiently develop a Montessori school within the County. Our biggest barriers to entry, however, is the rural nature of the western part of the County and transportation needs to sufficiently transport students to the school. Identifying an appropriate site for the school continues to be under investigation.

## II. Demographics and Market Data

a. Demographic Data – Sussex County: Here are some demographic data to consider:

Basic Statistics	State	Sussex	Kent	New Castle
Population	945,934	215,622	173,533	556,779
Age 0-4	56,033	11,435	11,280	33,318
Age 5-9	58,617	12,160	12,507	33,950
Age 10-17	59,280	11,636	13,105	34,539
African American	22.4%	12.8%	25.5%	25.1%
Hispanic	9.0%	9.5%	7.0%	9.5%
Median Income	\$ 60,231	\$ 53,505	\$ 55,169	\$ 64,875
Poverty:	12.5%	13.9%	14.1%	12.3%

Source: U.S. Census Bureau (2015 estimates)

Delaware Population Consortium (2016 estimates)

Sussex County has an estimated 35,231 children under the age of 14, according to the Delaware Population Consortium. Sussex County has the lowest median income among the three counties. It also has a poverty level higher than the state average. However, according to the US Census, poverty among children under 17 is much higher. School districts on the western side of the county (Woodbridge, Seaford, Laurel and Delmar have higher levels of poverty than the eastern side, particularly Seaford at 30% of current estimate of children under 18 in poverty.

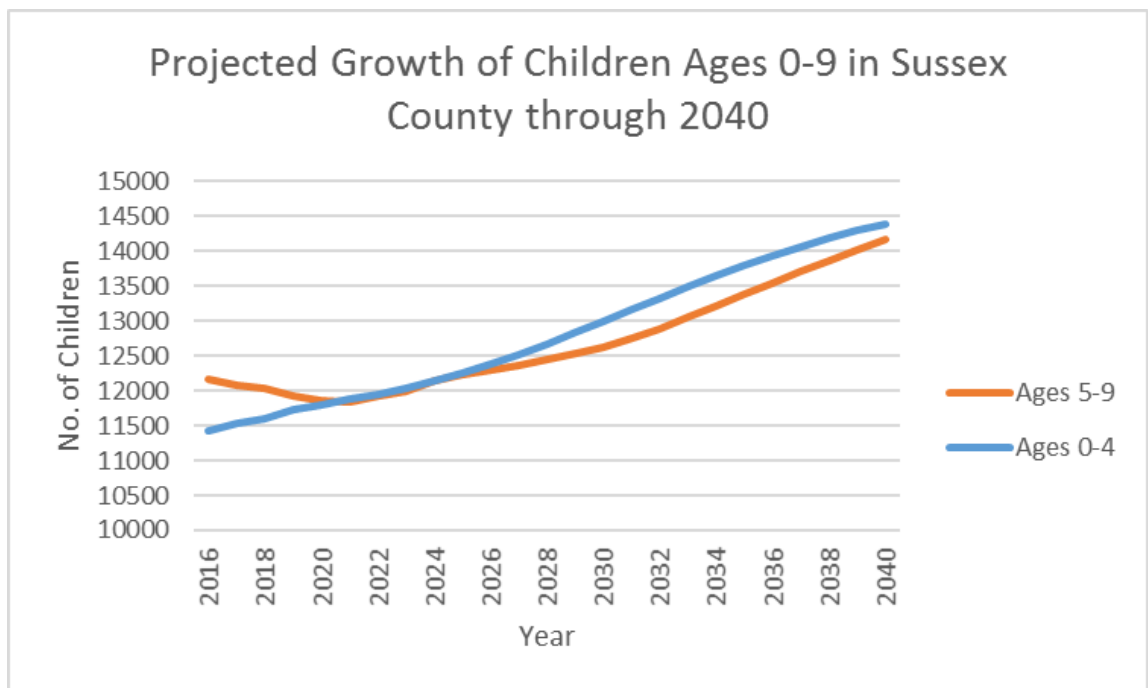
**2014 Poverty Estimates for School districts**  
**Source: U.S. Census Bureau, Small Area Income and Poverty Program (SAIPE)**  
**Release date: December 2015**

Name	Estimated Total Population	Estimated Population 5-17	Estimated number of children 5 to 17 years old in poverty	Percentage of Children 5 to 17 in poverty
Cape Henlopen School District	49,355	5,620	904	16.1%
Delmar School District	6,754	1,228	178	14.5%
Indian River School District	79,564	9,906	2,164	21.8%
Laurel School District	16,760	2,822	538	19.1%
Milford School District	29,805	4,902	953	19.4%
Seaford School District	25,213	4,265	1,286	30.2%
Woodbridge School District	16,026	2,799	598	21.4%

According to the Delaware State Housing Authority Housing Needs Assessment, which split Sussex County in to eastern and western sections (submarkets), incomes are significantly lower and poverty rates are higher in West Sussex than other submarkets except for South Kent County, its most similar neighbor. More than a third of all households (36%) earn less than \$25,000 per year, compared to 28%in Delaware. West Sussex is also sharply contrasted with East Sussex in terms of race; 18% of households are African American and 11% are Hispanic, compared to 10% and 7%, respectively.

b. Market Potential

- i. Population Projection: According to the Delaware Population Consortium, the population of the children 0-4 will increase over the next twenty – five years. However, children ages 5-9 will decrease in the next five then grow for the remaining 20 years. (See Chart 1).



Sussex County has a larger percentage of very young children and seniors than the State average. In fact, over 26% of the County's population ages 0 to 19 years.

c. StrongPoint Survey

In 2013, Montessori Works commissioned a study by Strongpoint to determine feasibility factors for a Montessori school in Sussex County. The study surveyed a total of 154 respondents, including 106 females (69%), 46 males (30%) and two not indicating. Interviews ranged from 1:25 to 11:57 minutes, with an average interview length of 8:15 minutes. Of the total, 79 (51%) were above age 30, 66 (43%) were under age 30 and 9 did not indicate. Racial heritage and ethnicity included 67 Hispanic, 21 African American, 17 Non-Hispanic/non-African American, 1 Asian, and 48 not specifying. Eighty-one participants have children between 1 and 9 years old, with the average number of children at 1.73. Of those who were not parents of children 1 to 9 years old, 39 (25%) indicated they had children in the extended families in that age range.

The majority, 96 respondents (62%), indicated they had not heard of the word "Montessori," while 22 (14%) said they had heard of the word. Interestingly, another 36 (23%) offered no response to this question or seem confused by the question.

The majority, 127 respondents (82%) did not respond to or seemed confused by this question. Twenty responses (13%) were either "I don't know" or "other." However, five respondents knew that Montessori is an educational philosophy or school, while two were more specific in saying that Montessori was an educational philosophy that is child directed/learn using your own method.

When introducing the concept of teaching "respect/character/problem solving" along with traditional subjects the majority of respondents (119 participants -77%) said they would seek to send their children to a public school teaching these concepts. Only two respondents said "no" while 33 gave no response.

The Strongpoint study recommended that Montessori Works develop two very important programs. First, it should "develop a comprehensive outreach/ education/ recruitment/ advocacy and marketing strategy that will help the organization close the "Montessori Awareness Gap," build public acceptance of and demand for a Montessori public school initiative in Sussex County. Second, it should create a comprehensive community outreach and marketing strategy through a parent engagement committee and to reach out to thought leaders, civic leaders, and other "influencers" with a well develop message about the efficacy of the school.

### **III. Location Survey**

a. Schools, Preschools, Day Cares in Sussex County

Sussex County has fewer students attending public, private and home schools than other counties.

<b>Public/NonPublic Enrollment (2015-16)</b>					
	<b>Public School</b>	<b>Home Schools</b>	<b>Private Schools</b>	<b>Total by County</b>	<b>Percent NonPublic</b>
Kent	30,485	795	1,903	33,183	8%
New Castle	78,656	1,066	12,000	91,722	14%
Sussex	26,886	584	908	28,378	5%
Total	136,027	2,456	17,513	155,996	13%
Percentage	87%	2%	11%	100%	
Source: Delaware Department of Education					

As stated earlier, there are fewer pre-K, kindergarten and elementary schools in Sussex County than in Kent and New Castle Counties. These schools are also geographically farther away from each other than in other counties. They are also fairly large (572 student average student enrollment), larger than the projected Montessori school enrollment (450 students total).

<b>Delaware Public Schools by Type and County (2014-15)</b>							
	<b>High</b>	<b>Vocational Technical</b>	<b>Middle</b>	<b>Elementary</b>	<b>Early Edu. &amp; Kindergarten</b>	<b>Special, ILC &amp; Other</b>	<b>Total</b>
Kent	6	1	7	28	2	10	54
New Castle	17	4	17	63	6	21	128
Sussex	7	1	8	19	2	8	45
Total	30	6	32	110	10	39	227
Source: Delaware Department of Education							

#### b. Charter Schools

Sussex County has an obvious lack of charter schools. There is only one charter school, Sussex Academy, which educates middle and high school students. There are no charter elementary schools. This limits the choices for students to attend schools with alternative offerings than district schools.

<b>Charter School by County (2014-15)</b>			
	<b>Number of Schools</b>	<b>Enrollment</b>	<b>Percent of Charter Enrollment</b>
Kent	5	1,643	13%
New Castle	19	10,380	83%
Sussex	1	498	4%
Total	25	12,521	100%
Source: Delaware Department of Education			

#### c. Public Elementary Schools

Research was performed into the enrollment per grade, racial, language and income characteristics for each of the elementary schools. These were compared with the district averages. Schools located on the western side of Sussex demonstrated a higher percentage of racial diversity and lower incomes than

schools on the eastern or northern parts of the County. Hispanic populations were varied depending on the residential clusters of individual towns. For instance, Georgetown exhibited higher Hispanic populations enrolled in elementary schools than in other parts of the Indian River School District. Incomes are also a key issue for many of the districts, particularly on the western side of the county. The tables included in **Appendix A** depict the enrollment by grade for each school in the six districts encompassing Sussex County. In addition, it depicts the racial, income and special needs characteristics and compares them to the district average. Certain data were noted to be above the district average in order to get a sense of location assuming that they are representative of the population in the area.

#### d. Residential Clusters

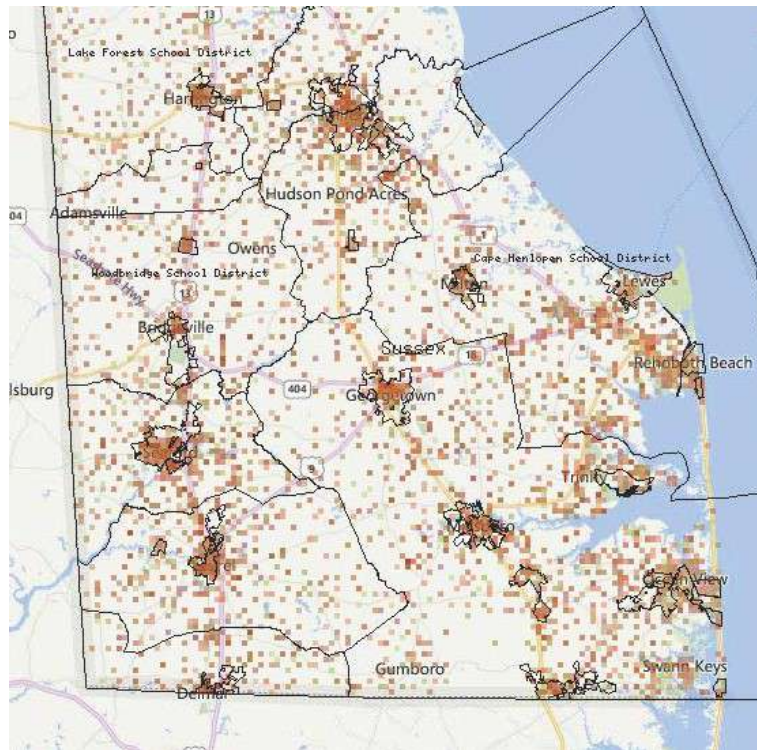
According to the Delaware State Housing Needs Assessment for 2015-2020, property values in West Sussex are the lowest of all the submarket areas evaluated by DSHA, with 18% of owned homes valued at less than \$100,000 (compared to 10% statewide) and a full 41% of contract rents are less than \$500 per month (compared to 17% statewide). These low prices are a reflection of household income, housing types and slow overall growth. Incomes are significantly lower and poverty rates are higher in West Sussex than other submarkets except for South Kent, its most similar neighbor. More than a third of all households (36%) earn less than \$25,000 per year, compared to 28% in Delaware. West Sussex is also sharply contrasted with East Sussex in terms of race; 18% of households are African American and 11% are Hispanic, compared to 10% and 7%, respectively. The most unique attribute of West Sussex is its housing stock. There are far more homeowners living in mobile homes, and far more renters living in single family homes, than state average. Approximately 1 in 5 homeowners lives in a mobile home, compared to 1 in 11 for the state. In contrast, 2 in 5 renters lives in a single family home, compared to 1 in 5 for the state. This is fairly typical for rural communities, where incomes are too low to support new, stick-built construction. The more affordable options are the existing, aged housing stock and trailers. Presumably this aging housing stock is also the cause for a higher percentage of substandard units than state averages, with 12% of homes considered vacant, but are not on the market or serve as vacation homes. The primary industry in this area is manufacturing, with 2.3 times the employment in this sector than state average. (Delaware State Housing Authority, 2014)

Sussex County has experienced annual double digit growth in building permits in the past five years, with 80% of them residential and primarily on the eastern side of the County. However, new development in western Sussex has increased since 2008, albeit in small numbers. Likely due to the available land and proximity to East Sussex communities and Route 13, almost 1,000 new building permits were issued over a five-year period.

Map 1.0 shows concentrated developed areas (cities and towns) and a distribution of individuals ages 0-17 years. Larger concentrated areas included Georgetown, Laurel, Millsboro and Seaford.



Map 1.0 - Distribution of children 0-17 years of age:



Map 1.0 shows the distribution of these areas by race and income. Western Sussex has a higher concentration of minority population and lower income areas than the remainder of the county.

e. Day Care and Pre-K Facilities

There are currently 249 licensed day care, pre-k and private kindergarten providers in Sussex County. Eighty-six (86) are enrolled in the Delaware Stars program, a certification and performance monitoring initiative sponsored by the Delaware Department of Child, Youth and Their Families. These centers generally have larger capacities. There are another 163 licensed providers which do not participate but most serve less than 10 children. All together, these centers serve over 6,000 children each day.

f. Academic Performance

According the Rodel Foundation assessment of public education in 2015, four Sussex County school districts scored below the state average in English Language Arts: Milford, Seaford, Woodbridge and Laurel. Three scored below the state average in Math: Seaford, Woodbridge and Laurel. The area of greatest concern in the 36 point achievement gap among students with special needs, low income and English Language Learners. Scores from African American and Hispanics students also demonstrate significant gaps from their white counterparts.

Characteristic	ELA Achievement Gap (Points below state average)	Math Achievement Gap (Points below state average)
Combined (SPED, Low Income, ELL)	36	35

African American	28	29
Hispanic	24	22
Low Income	26	23
ELL	38	25

Source: Rodel Foundation

g. Transportation Routes

Being 936 square miles, Sussex is the largest county in the state. However, it has the lowest per capital population per square mile (210.6 persons per square mile versus 276.9 for Kent and 1,236.2 miles for New Castle). The average commute time from home to work is 25.2 minutes. Major transportation routes include State Routes 1, 13, 113, 9, 24 and 404. Many of the roads, primarily on the eastern side of the County, are faced with congestion, particularly during the summer months. The major corridors such as Rt 113 and Rt 1 are undergoing review and rehabilitation to eliminate safety issues. The western portion of Sussex County has fewer periods of congestion. Major roads connect town centers and traffic congestion is relegated to larger roads. Few residential areas are in the western portion of County and traffic flows are relatively smooth. Farm equipment transportation may be an impediment to through traffic; however, the frequency is not great enough to consider in the analysis. The ideal location for Sussex Montessori would be along a major road or corridor. Most of the elementary schools are located along major corridors. Consideration should be given to the length of time from residence to school given the longer commutes from town center to town center. Ideally, the school location should be between the four western towns (Bridgeville, Georgetown, Seaford and Laurel) to evenly distribute the drive times for bus traffic and personal commutes.



## IV. Financial Viability

### a. School Size

Sizes of elementary school vary in range from 300 to 750 students depending on the location. Sussex Montessori is contemplating a smaller school initially, starting with approximately 300 students and growing over a five-year period to 450 students. Chart XX depicts the “waterfall” diagram of matriculating students over the period.

Grade	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6
Kindergarten	75	75	75	75	75	75
Grade 1	75	75	75	75	75	75
Grade 2	50	75	75	75	75	75
Grade 3	40	50	75	75	75	75
Grade 4	30	40	50	75	75	75
Grade 5	30	30	40	50	75	75
Total	300	345	390	425	450	450

The budget for the school is driven directly on the basis of enrollment. Student thresholds predicate the creation of a unit or the state share of a teacher or staff member. These thresholds are:

Grade K-3 students =	16.2 students for 1 unit
Regular students grades 4-12 =	20.0 students for 1 unit
Basic IEP students grades 4-12 =	8.4 students for 1 unit
Intense IEP Students grades 4-12=	6.0 students for 1 unit
Complex IEP Students 4-12=	2.6 students for 1 unit

For the purposes of estimating the budget, we have not included special education students as part of the scenarios. We will further refine the enrollment data once we determine our optimal size. Lastly, we anticipate the need for 1 teacher and 1 assistant (paraprofessional) in the classroom for each class of 25 students. This means that we will not generate enough state units to staff the school solely on state appropriations. We will need to use local funding and Division III Equalization funding to fill the salaries needed to appropriately staff the classrooms.

### b. Financial Scenarios

Based on the waterfall scenario, revenue and expenditure estimates were developed for the first 5 years of the school. This financial scenario is meant to demonstrate order of magnitude; further refinement of the budget will occur in the application. Revenue is comprised of:

- State appropriations based on enrollment
- Local appropriations based on the number of students from each district with the student’s respective district paying for the local share of the student’s cost. Each local district has a different revenue per student amount.
- Federal funding, including free and reduced lunch programs, Title I, Title II, Title III, Title IV where applicable.
- Private funding from individual donors

Revenue projections for each year are included in the Appendix. For the purposes of making an estimate, a projected number of students from each of the districts in the area was used to develop the revenue estimate and is broken down as follows:

<b>Distribution of Students</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	<b>Year 5</b>	<b>Year 6</b>
Cape Henlopen	20	20	20	20	20	20
Delmar	20	25	30	30	30	30
Indian River	50	60	70	80	80	80
Laurel	80	90	100	115	125	125
Milford	20	20	20	20	20	20
Seaford	100	120	130	140	150	150
Woodbridge	10	10	20	20	25	25
<b>Total</b>	<b>300</b>	<b>345</b>	<b>390</b>	<b>425</b>	<b>450</b>	<b>450</b>

Based on the distribution of students above, revenue estimates were generated for the state and local appropriations. Among these appropriations, state funds are split into various pools of funds (Division I (Salaries and OECs), Division II (Materials, Supplies, Equipment and Energy), Division III (Equalization funding distributed from one district to another to create balance in funding), and Transportation. In addition, federal revenue estimates are based on free and reduced lunch programs. Other federal funds cannot be developed until percentages of special education and poverty are determined (these will be included in the application).

Expenditures are estimated based on the number of salaries and other employment costs for personnel. Instructional support and operational support are capped at the Division I state allocation. Additional funding through Division III and local funds are allocated to additional staffing and facility costs. A two percent contingency is included in the scenario. A summary projected budget is depicted below. A more detailed budget is included in Appendix A.

Due to the startup costs of the school, particularly for materials and supplies and the need for two full-time personnel in each classroom, additional funds over and above the state and local appropriations may be needed. It is estimated that approximately \$200,000 will be required in order to meet contingency requirements and have additional reserves available for programming. Unanticipated costs are expected, particularly in special populations, such as English Language Learners and students requiring Individualized Educational Plans (IEPs), which cannot be estimated with reliability until we begin the enrollment process.

Revenue and Expenditure Estimates					
Sussex Montessori					
	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023
<b>Number of Students</b>	300	345	390	425	450
<b>Number of Teachers/ Asst. Needed</b>	24	27.6	31.2	34	36
<b>Revenues</b>					
State Appropriations					
Division I (Salaries)	\$ 1,678,345	\$ 1,971,614	\$ 2,231,875	\$ 2,301,457	\$ 2,579,529
Division II (MS&E)	\$ 106,330	\$ 126,546	\$ 143,194	\$ 148,350	\$ 165,099
Division III (Equalization Funds)	\$ 283,884	\$ 337,733	\$ 383,638	\$ 395,674	\$ 445,057
Transportation	\$ 236,536	\$ 272,017	\$ 307,497	\$ 335,093	\$ 354,804
Local Appropriations	\$ 436,185	\$ 512,381	\$ 578,244	\$ 593,774	\$ 656,644
Federal Programs	\$ 187,500	\$ 215,625	\$ 243,750	\$ 265,625	\$ 281,250
Private Funds	\$ 200,000	\$ -	\$ -	\$ -	\$ -
Carryover Funding	\$ -	\$ 8,944	\$ 395,678	\$ 886,898	\$ 1,026,959
<b>Subtotal</b>	<b>\$ 3,128,780</b>	<b>\$ 3,444,860</b>	<b>\$ 4,283,876</b>	<b>\$ 4,926,871</b>	<b>\$ 5,509,342</b>
Teaching Units	19.84	23.61	26.72	27.68	25.14
Other Units	10.52	12.13	10.94	13.75	17.14
<b>Expenditures</b>					
Personnel Salaries / Other Employer Costs	\$ 1,615,765	\$ 1,928,900	\$ 2,123,485	\$ 2,523,143	\$ 2,598,601
Student Support	\$ 945,071	\$ 721,482	\$ 828,893	\$ 902,768	\$ 947,107
Operations and Maintenance of Facilities	\$ 283,500	\$ 321,300	\$ 359,100	\$ 388,500	\$ 409,500
Administrative/Operations Support	\$ 240,500	\$ 42,500	\$ 50,500	\$ 50,500	\$ 32,500
Management Company	\$ 35,000	\$ 35,000	\$ 35,000	\$ 35,000	\$ 35,000
<b>Subtotal</b>	<b>\$ 3,119,836</b>	<b>\$ 3,049,182</b>	<b>\$ 3,396,978</b>	<b>\$ 3,899,911</b>	<b>\$ 4,022,709</b>
<b>Surplus/(Deficit)</b>	<b>\$ 8,944</b>	<b>\$ 395,678</b>	<b>\$ 886,898</b>	<b>\$ 1,026,959</b>	<b>\$ 1,486,634</b>
<b>2% contingency (required by the state)</b>	<b>\$ 54,826</b>	<b>\$ 64,597</b>	<b>\$ 80,815</b>	<b>\$ 93,237</b>	<b>\$ 104,574</b>
<b>Net Surplus/Deficit after Contingency</b>	<b>\$ (45,882)</b>	<b>\$ 331,081</b>	<b>\$ 806,083</b>	<b>\$ 933,722</b>	<b>\$ 1,382,060</b>

### c. Capital Requirements

A number of factors determine the facility costs for the school, most importantly enrollment. The facility cost in the estimated budget is based on a fully charged rent for an existing facility at \$12 per square foot based on 85 square feet per student. The current state suggested square footage for a school is 85 square feet per student. However, the National Center for Montessori in the Public Schools indicates that, due to the fluid nature of the classroom, square footage allocations can be as small as 37 square feet per student. The additional square footage represents allocations for utilities and custodial costs. The rent should be structured so that the school can grow into the available space as the enrollment grows. It is recommended that the school consider both new build and renovation options. However, the availability of existing facilities that could reasonably and affordably accommodate a school in this area is scarce. Also, depending on the facility, new build costs (with capitalized interest) in areas with less expensive land (as in Sussex County) may be less expensive than renovation of a property and leasing property.

Building a new school facility will require a completely different set of capital funding requirements and may require structured financing. Consideration should be given to the cost of land and the cost of capital (interest on debt) when developing these financings. Use of public bonds through the state, county is a preferred choice. Stand-alone financings will be more problematic due to the need for

guarantees and may require the school to own the underlying property and / or the school building as a collateralized asset. In conjunction with the probability of meeting enrollment targets, ownership provides greater assurances of the school dedication to staying open and making the repayment terms. Another alternative is for private third party financing, such as a school development corporation, which builds then leases the property back to the school. The developer assumes the risk based on the assumption of enrollment and financial viability of the school. Over the long run, the school may acquire the property from the developer with interest and principal reduced through the previous lease payments.

A last alternative is to align the school with a school district as an authorizer, then potentially co-locate with a middle school in the area. This will require a local school district to approve a process for authorization, review the authorization request and approve a charter. This is also contingent on available school capacity and facilities.

#### d. Operational Needs

Sussex Montessori will require a number of important amenities for support of students and to be operationally sufficient. First, the hiring of a school leader will be key to not only operation of the school but to the student recruiting effort. Preferably the Principal should have Montessori training and experience. In addition, a full complement of teachers and assistant teachers will be needed by September 2018. Opportunities for training are available, but prior experience is a better indicator of effectiveness. Teachers will be required to integrate their Montessori approach to state educational requirements in order to meet state standards on subject, particularly in the higher grades (4-5). Cafeteria, transportation, custodial and maintenance staff will be needed as well. Lastly, we can anticipate a need for special education teachers but we are unsure of how many will be needed. Administrative and instructional staff will need to consider time necessary to build and monitor individual educational plans (IEPs) to accommodate needs of special education students. Use of federal funding may help in this regard.

There are only two school bus companies operating in the western Sussex County area (First Student and R&M Buses). Most school districts operate their own buses. Possibilities exist to lease bus service from one of the school districts. Sussex Montessori will also work with the Department of Education on procuring service through their statewide contracts. Buses typically cost \$35,000 per year per bus to lease service. Obtaining qualified drivers is the biggest challenge to bus companies in meeting demand. An alternative is to purchase buses as a school fleet, such as is done by Providence Creek Academy. Loans funds may be obtainable through the U.S. Department of Agriculture (USDA) Community Loan Program.

#### e. Fundraising Viability

Private funding comes in various forms, particularly individual giving, corporate sponsorship and charitable contributions and foundation support. The established foundations (e.g. Longwood Foundation, Welfare Foundation, Crystal Trust and Laffey-McHugh) have been generous in their giving, particularly if the mission of the school aligns with educational reform and advancement of closing the achievement gap in areas of poverty. Giving is primarily geared toward specific programs and capital needs. Operational funding is often not available. Sussex Montessori should pursue these opportunities in order to seed facility costs prior to opening the school.

Corporate giving can be obtained, however, the sums are not large, usually in the \$5,000 to \$25,000 range. Our community engagement efforts will hopefully draw interest from the business community since we will be providing educational opportunities to their employees and potentially draw more businesses to the area if the quality of education improves.

Individual giving is specific to the interests of the giver, primarily dedicated to a specific school. Sussex Montessori should develop a relationship with individuals of means who are interested in furthering the model. Focus should be on one or two individuals or families that have experience in the Montessori method and are interested in donating to a school that will address needs of this geographic area and economic environment.

The Department of Education has indicated that new charter schools should base their budget estimates on state and local appropriations and not count donated funding for closing gaps that low enrollment would produce. Our estimates are based on this recommendation.



## V. Community Engagement

Montessori Works recognizes that the most significant component of starting a charter school is community engagement. This includes parents, the business community and community at large.



We are engaging the Sussex Community in a number of ways.

### a. Create and Prioritize Opportunities to Engage with the Community

The purpose of our attendance at these events will be to make a minimum of 10 connections. Montessori Works will follow up directly with each connection. Montessori Works will guarantee attendance at the following events in Sussex County:

#### Upcoming Community Events

- First State Community Action Agency Community Dinner (\$1 per person)  
Opportunity: Sit down w/ parents and community members for dinner. Great time to talk and have organic conversation and hand out fliers/ information bills.
  - Recurring - 3rd Thursday of each month
  - Thursday, September 15th from 6 PM – 8 PM
  - Thursday, October 20th from 6 PM - 8 PM
  - Thursday, November 17th from 6 PM - 8 PM
  - Thursday, December 15th from 6 PM - 8 PM
- ESSA Community Conversations: A series of community conversations later this month will allow parents, teachers, administrators, and others to offer input on specific questions that the state must address in its plan.
  - 6 p.m., Tuesday September 20 at Cheer Center, Georgetown
  - 10 a.m., Saturday September 24 at Christina Cultural Arts Center, Wilmington
  - 6 p.m., Tuesday September 27 at Bunker Hill Elementary School, Middletown

- 5:30 p.m., Thursday September 29 at Collette Education Center, Dover
- Charter School Expo (Wilmington) Opportunity: To network with other charter school in the Delaware Charter School network. Great opportunity to meet business leaders and other community stakeholders.
  - Saturday, November 5th (10 AM - 2 PM) Arsht Hall
- Vision Network Event (9th Annual Vision Coalition Conference)  
Monday, November 14, 2016
- La Esperanza Festival, Georgetown Delaware  
September 18th, 11 AM - 7 PM

b. Offering Meaningful Opportunities to Participate

During community events hosted by Montessori Works will end each event with the opportunity to get involved with Montessori Works. Attendees can get involved by:

- Host a community event
- Host a home discussion
- Attend a Board Meeting
- Submit a testimonial/ signature of support

c. Turn Community Supporters into Advocates

Montessori Works will host two events specially designed for business leaders and other stakeholder supporters of our work. Over the past two years Montessori Works has engaged with several business leaders in Sussex County, the primary focus of these two meetings will be create sustainable and actionable support from business stakeholders in Sussex County. Montessori Works will plan to host business events on the following dates:

- Saturday, October 15th: Cadbury Center, Lewes, DE
- Tuesday, October 25th: Delaware Community Foundation, Georgetown, DE

Business stakeholders can get involved by:

- Sussex Operational Board
- Sussex Board of Trustees
- Donate

d. Board of Trustees / Operating Board Recommendations

Sussex Montessori will have two boards. The Board of Trustees will include notable “influencers” in the financial, business and educational realm who will provide for financial and larger community relationships in building the school. The school will also have an operating board, responsible for fiduciary, legal, operational, educational, human resource activities and student/parent engagement. These boards need to be established for the application process.

## VI. Recommendations

A number of characteristics of the demographic and educational data for schools in Sussex County point to the need to expand educational opportunities for pre-k through Grade 5 (Pre-K, Kindergarten and Elementary school) children, particularly on the western side of the County. Among the more salient indicators:

- Lower incomes and unemployment rates are higher on the western side of the county. Socio-economic factors are an indicator of a child's performance on standardized tests;
- Schools and school districts on the western side (Laurel, Woodbridge, Seaford) have a higher percentage of lower income, ELL, special needs and minority populations than their eastern counterparts;
- Parents of over 6,000 students are now paying for private day care, pre-k and kindergarten services, a leading indicator of potential student enrollment if Sussex Montessori were to open;
- Transportation access to elementary schools is lengthy; Sussex Montessori could provide another option;
- There are no elementary charter schools in Sussex County;

It is recommended that Sussex Montessori apply for charter approval in December 2016. We should consider the location of the school within the triangle area between Bridgeville, Seaford and Laurel and Georgetown along a major corridor.

Financially, Sussex Montessori will be supported by state and local appropriations. This is based on enrollment. We anticipate a school size of 300 to 450 students over five years. At the current size, the school will require additional private support in the first year to meet its budget. Enrollment may need to be increased to generate the necessary units and state funding needed to support the school.

It is recommended the school rent its facility space, ideally through a renovated space. Larger classrooms would be ideal in order for students to maximize their movement and learning opportunities. By comparison, a newly built facility will double the size of its facility costs and make the budget untenable in the short run. Once approved, it is suggested that a capital campaign begin to raise funds for a new facility.

## VII. Next Steps

### Next Steps:

- A series of community events will be held in Sussex County in September and October to develop community building, public awareness and participation in leadership and volunteerism in the school.
- Board of Trustees and an Operating Board will be created by the end of October.
- Application for the charter school will be prepared in September – November and submitted in December.
- Post-submission advocacy and responses to Delaware Department of Education questions will be prepared.
- Fundraising efforts will include campaigns both operational and capital requirements. Funds for the planning year (July 2017-2018) will need to be secured. Total estimated needs: \$250,000

- Site location survey is on-going and will be concluded by December 2016.
- Develop a Montessori teacher pipeline with a local Montessori teacher training program.

## Appendix A

## Enrollment and demographics of District Elementary Schools – Sussex County

Public Elementary Schools in Sussex by Enrollment 2015-2016				Average Enrollment						
				572.42						
<b>Cape Henlopen School District</b>	<b>Brittingham</b>	<b>Milton</b>	<b>Rehoboth</b>	<b>Shields</b>						
Pre-Kindergarten	0	0	0	0						
Kindergarten	90	81	99	96						
Grade 1	94	88	96	102						
Grade 2	105	95	111	117						
Grade 3	107	91	103	130						
Grade 4	98	102	95	139						
Grade 5	90	98	99	123						
<b>Total</b>	<b>584</b>	<b>555</b>	<b>603</b>	<b>707</b>	<b>Dist. Avg</b>					
African American	21.1%	11.7%	9.3%	8.5%	13.7%					
Hispanic	31.7%	11.4%	10.3%	10.2%	14.3%					
ELL	15.4%	5.1%	5.3%	3.0%	4.3%					
Low Income	57.4%	30.2%	34.7%	23.7%	32.8%					
Spec Ed	12.5%	14.7%	9.5%	8.7%	16.9%					
<b>Indian River School District</b>	<b>East Millsboro</b>	<b>Georgetown</b>	<b>Georgetown KC</b>	<b>Clayton</b>	<b>Long Neck</b>	<b>Lord Baltimore</b>	<b>N. Georgetown</b>	<b>Showell</b>		
Pre-K	16	33	0	10	29	18	27	7		
K	105	10	326	94	122	101	0	54		
Grade 1	165	172	0	104	126	107	170	50		
Grade 2	131	165	0	102	114	106	171	60		
Grade 3	126	114	0	108	153	97	151	68		
Grade 4	116	149	0	88	118	101	150	74		
Grade 5	130	132	0	84	118	103	125	61		
<b>Total</b>	<b>789</b>	<b>775</b>	<b>326</b>	<b>590</b>	<b>780</b>	<b>633</b>	<b>794</b>	<b>374</b>	<b>Dist Avg</b>	
African American	18.5%	13.5%		23.6%	12.8%	2.2%	5.8%	21.1%	13.3%	
Hispanic	17.4%	53.0%		43.6%	17.2%	6.2%	62.1%	26.5%	13.6%	
ELL	8.1%	36.1%		25.1%	10.4%	3.5%	55.2%	14.4%	30.4%	
Low Income	42.3%	53.7%		56.6%	55.0%	32.5%	55.2%	44.9%	42.1%	
Spec Ed	11.2%	20.5%		19.2%	15.3%	12.5%	13.1%	17.1%	16.2%	

Laurel School District		Dunbar	N. Laurel		
Pre-Kindergarten		18	0		
Kindergarten		213	0		
Grade 1		200	0		
Grade 2		0	225		
Grade 3		0	213		
Grade 4		0	205		
Grade 5		0	0		
<b>Total</b>		<b>431</b>	<b>643</b>	<b>Dist Avg</b>	
African American		27.8%	27.5%	30.1%	
Hispanic		13.0%	12.8%	11.5%	
ELL		8.4%	12.3%	7.0%	
Low Income		59.6%	58.2%	54.2%	
Spec Ed		9.3%	14.5%	15.4%	

Milford School District		Benneker	Mispillon	Ross	Morris ECC	
Pre-K		0	0	0	32	
K		0	0	0	334	
Grade 1		105	110	144	0	
Grade 2		112	113	133	0	
Grade 3		87	115	115	0	
Grade 4		110	112	98	0	
Grade 5		114	105	119	0	
<b>Total</b>		<b>528</b>	<b>555</b>	<b>609</b>	<b>366</b>	<b>Dist Avg</b>
African American		26.6%	28.6%	19.6%	26.5%	24.3%
Hispanic		20.5%	16.1%	26.5%	19.7%	19.0%
ELL		16.2%	13.3%	17.8%	0.5%	9.1%
Low Income		56.8%	50.9%	49.1%	54.0%	45.0%
Spec Ed		13.3%	14.0%	10.4%	17.8%	13.9%

Seaford School District		Blades	Douglass	Seaford Central	West Seaford	
Pre-Kindergarten		0	46	0	0	
Kindergarten		93	58	60	86	
Grade 1		92	55	61	97	
Grade 2		105	75	74	94	
Grade 3		86	67	80	71	
Grade 4		92	51	68	63	
Grade 5		81	59	75	63	
<b>Total</b>		<b>549</b>	<b>411</b>	<b>418</b>	<b>474</b>	<b>Dist Avg</b>
African American		25.0%	42.3%	34.4%	41.8%	35.8%
Hispanic		22.4%	15.3%	3.3%	19.2%	17.1%
ELL		17.9%	15.4%	8.4%	21.7%	11.9%
Low Income		60.5%	61.1%	41.6%	65.8%	54.5%
Spec Ed		10.0%	24.1%	15.7%	9.7%	16.9%

Woodbridge School District		Wheatley	Woodbridge Early Ed		
Pre-Kindergarten		0	25		
Kindergarten		0	193		
Grade 1		0	174		
Grade 2		0	202		
Grade 3		221	0		
Grade 4		200	0		
Grade 5		229	0		
<b>Total</b>		<b>650</b>	<b>594</b>	<b>Dist Avg</b>	
African American		23.8%	24.2%	27.0%	
Hispanic		23.8%	22.9%	20.8%	
ELL		11.5%	13.5%	8.2%	
Low Income		52.3%	53.0%	49.6%	
Spec Ed		8.3%	9.6%	12.2%	

	= Above the District Average				
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