

Sussex Montessori School

Application for Charter Authorization

Submitted to the
Delaware Department of Education

January 2, 2018

Sussex Montessori School Charter Application

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Narrative Table of Contents - Please click on title to link to section.

0.1	School Proposal Overview
0.2	School Enrollment Projection
1.1	Executive Summary
1.2	Founding Group and School Leadership
1.3	Educational Plan
1.4	Performance Management
1.5	Staffing
1.6	Governance and Management
1.7	Community Engagement
1.8	Start-up and Operations
1.9	Facilities
1.10	Finance and Budgeting

School Proposal Overview

Provide information for the primary point of contact for the applicant team. This individual will serve as the contact for all communications, interviews, and notices regarding the submitted application. (**Note!** Names and contact information may be shared with external groups by the Delaware Department of Education.) The information in this section is not included in narrative page limit.

Name of proposed school	Sussex Montessori School
Opening year	Fall 2019
Geographic community †	Central Sussex County
Model or focus (e.g., Arts, College Preparatory, Dual-Language, etc.)	Montessori School
Primary contact person (name, email, mobile phone, fax)	Linda S. Zankowsky, Board Chair lindaz@montessoriworks.org . 302-388-8124
Mailing address	Montessori Works/ Sussex Montessori School 3029 Bowlerama Drive New Castle, DE 19720
Board Chair (name, email, mobile phone, fax)	Linda S. Zankowsky, Board Chair lindaz@montessoriworks.org . 302-388-8124
Name of applicant group or entity applying	Sussex Montessori School

† Identification of geographic community may be as specific as a neighborhood or as general as the city/town identified for the school location.

Provide the names and roles in the applicant team and current employer of all persons on the applicant team.

Name	Role	Current Employment & Title
Jessica Crampton- Bradley	Board Member	Realtor, Lingo Realty
Mark Conces	Board Treasurer	Director, Santander Bank
Christine Carrino Gorowara, Ph.D.	Board Member	Interim Director, Delaware Center for Teacher Education, University of Delaware
E. McCrae Harrison, M.Ed.	Board Secretary	Teacher, Montessori Academy at Christina School District
Trish Hermance	Board Member	Director, Delaware Teachers Institute, University of Delaware
Jesse Reeves	Board Member	Barnes & Thornburg LLP. Director of Lateral Recruiting
Scott Richardson, Ph.D.	Board Member	Educational Consultant – Special Education, Adjunct instructor University of Delaware
Sean Steward	Board Member	Realtor, Home Team Realty
Linda Zankowsky, Ed.D.	Board Chair	Interim Director, Early Learning, University of Delaware

While not on the official application team, the application refers to the support that has/will be provided by the following:

Mark Chura	Facility Project Manager	Horizon Philanthropic
Brett Taylor	Finance Consulting	Independent Consulting Support
Mike Rawl	Fund Raising Campaign	Horizon Philanthropic
James Taylor	Legal Consult	Saul Ewing Arnstein & Lehr Llp

Does the school expect to contract or partner with a Charter Management Company or other organization for school management/operation?

Yes

No

If yes, provide the name of the Charter Management Company or other partner organization if known.

(Note! If the applicant plans to contract with a Charter Management Company, the applicant must complete the Charter Management Company and Highly Successful Charter School Operator Supplement (See Section 2.5) in addition to the application narrative.)

Proposed Principal/School Leader Information (if known)

Proposed Principal/School Leader Candidate (name, email, mobile phone, fax)	School Leader is not yet chosen.
Current Employment	

School Enrollment Projection

Grades	Number of Students				
	Year 1 2019-2020	Year 2 2020-2021	Year 3 2021-2022	Year 4 2022-2023	Year 5 2023-2024
K	65	65	65	65	65
1	65	65	65	65	65
2	65	65	65	65	65
3	65	65	65	65	65
4		65	65	65	65
5			65	65	65
6				65	65
Total Students	260	325	390	455	455
Classes K/1	5	5	5	5	5
Classes 2/3	5	5	5	5	5
Classes 4/5/6		3	5	7	7
Average number of students per class	26	26	26	26	26

Student Demographics: Provide your estimated student demographics below.

	Low Income%	Special Education %	English Language Learners (ELL) %
Projected Demographics	50%	20%	10%

1.1 Executive Summary

14 Del. C. §§ 512(1)-(3). And (5)-(6)

The purpose of the Executive Summary is to provide a high-level overview of the application. The Executive Summary does not receive a rating and is to contain the following. The page limit for the Executive Summary is 5 pages.

1. Mission and Vision Statements

- a. **Provide a mission statement and a vision statement that will give the reviewers and interested members of the public an overview of the proposed charter school. The mission and vision statements should be specific, clear, and brief and provide the foundation for the entire school proposal and operational plan. Accordingly, the mission and vision statements must be aligned with the legislative intent set forth in 14 Del. C. § 501, the approval criteria in 14 Del. C. § 512 and the restrictions on charter schools in 14 Del. C. § 506.**

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.

The Vision of the Sussex Montessori School (SMS) is to use the Montessori Method to educate children through authentic personalized learning experiences, respectful relationships, opportunities to innovate, and a focus on global citizenship. We believe that the creation of a Montessori public school in Sussex County, DE will improve student learning, allow for greater choice for parents, and serve as a model for alternative approaches to education by providing a proven and innovative teaching and learning environment.

2. Educational Need and Target Population

- a. **Identify the target population, grade levels, and school district(s) that the school will serve. Briefly describe the intended effect on the existing community and provide a rationale for the chosen location.**

Sussex Montessori School will enroll students aged 5-12 years old (Kindergarten through Grade 6) who wish to participate in the Montessori approach. It is expected that the school will primarily draw students from the western side of Sussex County in the corridor bounded by Bridgeville to Laurel and west of Georgetown to Seaford. This corridor lacks educational options other than district schools, has no elementary charter schools, and has no Montessori educational opportunities. SMS will provide an option for families who seek a brain-based, child-centered, differentiated learning environment.

- b. **Explain how the proposed charter school, including the grade levels chosen, will clearly meet the identified needs of the community and the targeted student population.**

In Sussex County, there is a projected rapid population growth in children 0-9 years of age over the next 20 years combined with increasing rates of poverty. 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. In addition, there are fewer educational opportunities in Sussex County than in the remainder of the state. This is particularly true for early childhood and elementary programming. Outside of the traditional public schools, there are no other easily accessible opportunities for children in this age group. Current state assessment data indicates that in Western Sussex districts 50% or less of the children in grades 3 through 6 meet state standards on state assessments. According to the Rodel Foundation assessment of public education in 2015, the area of greatest concern is the 36-point achievement gap among students with special needs, students with low income, and English Language Learners. Scores from African American and Hispanic students also demonstrate significant gaps from their white counterparts. It is clear that the traditional public schools are not working well for many children in Sussex County. The Montessori approach, which was scientifically developed to meet the natural development of all children as learners, offers a proven alternative to the traditional public model for children in Sussex County.

c. Identify how many families have indicated their intent to enroll in your school.

Sussex Montessori School has run a community campaign for approximately 3 months. We have over 314 surveys from community members interested in the school reflecting about 305 children for whom parents would be interested in the school as a choice for enrollment. We continue to receive interest surveys daily.

3. Community Engagement

a. Describe how the applicant has assessed demand and solicited support for the school.

Sussex Montessori School has had extensive communication with parents, business leaders and civic officials during over the past four years. Much of this has been one on one meetings with community leaders, groups, and business leaders. In July, 2017 Sussex County resident Jim Purcell was engaged to support our community engagement efforts. In addition, Montessori Works launched a social medial campaign in the late summer of 2018 which has greatly enhanced the community awareness and support for the school. Montessori Works has had several articles both print and online in the Sussex County newspapers and the News Journal.

Presentations and Meetings:

- Meetings with business leaders to discuss the school, educate the leaders on its benefits and ask for financial and facilities support for the school;
- Presentations at local community groups such as the County Chamber of Commerce, Rotary Clubs, Lions Clubs, First State Community Action Council, Sussex Early Childhood Council, Leadership Delaware, etc.
- Marketed the school to all day cares and kindergartens in the Georgetown-Laurel- Seaford- Bridgeville corridor;
- Meetings with Sussex County civic leaders, including state legislators and county administrators;
- Meetings with school district leaders.

An extensive list of the Sussex County community residents and leaders that we have engaged with is provided in Section 1.7. It has been clear to the Sussex Montessori School Board that there is a desire for educational choices in Sussex County and in particular an interest in Montessori education.

- b. Describe any relationships the applicant currently has or plans to build to engage students, parents, and the community in support of the school.

We have been supported financially by the Longwood Foundation, the Welfare Foundation and Discover Bank. Community partners include but are not limited to First State Community Action, the Summer Collaborative, La Esperanza, and the Delaware Community Foundation. We are currently engaging Horizon Philanthropic to lead a fund raising and communication campaign in Sussex County. Horizon Philanthropic has a long history of successful fund raising for non-profits in Sussex County. Leadership Delaware has recently reached out to its Sussex County leaders who we will meet with in the coming months. We hope that this will be a source of potential Sussex County founding and future operating board members for the school. We continue to hold community outreach events, present at local Rotary clubs, engage in community dinners at First State Community Action, and host business leaders for an information session. In addition to expressing an interest in enrolling children in the school, our interest surveys have identified over 26 people who are interested in volunteering for the school and another 17 who are interested in teaching at the school. We will build on this strong foundation of community interest in the months ahead with a continued social media presence, personal conversations, committee work, and appearances at community events.

4. Educational Plan

- a. **Briefly describe the most important characteristics of the educational program, including any specific educational philosophy, instructional methods, educational model, or other important features of the proposed school.**

The Montessori Method is successfully used around the world and designed to educate the whole child, utilizing personalized learning, peer relationships and real-life skills to develop innovative thinkers and global citizens. The Montessori Method provides a unique choice for students: a holistic, personalized approach to learning for a diverse student population. As a result of their participation in a Montessori education, students 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.

Sussex Montessori School will use the Responsive Classroom Approach to develop a consistent and coherent positive school environment across the school community. This research based approach has been shown to positively impact student achievement, improve teacher-student interactions, and increase the amount of time children are engaged in the classroom. The Responsive Classroom approach provides a framework for the social climate of the Montessori classroom and school.

b. Briefly describe the learning environment and culture.

The learning environment in a Montessori School is uniquely suited to support children's learning due to the cohesiveness created by the commitment to Montessori principles across the school community. Montessori Teachers are all specially trained in the philosophy and use of Montessori materials in the classroom.

The culture in Montessori classrooms is one of mutual respect between adults and students. The result is a classroom and school environment in which students are free to learn on a personalized level, working at their own pace in content that engages them. Montessori classrooms are "responsive classrooms" where prepared teachers allow students to engage, explore, test their assumptions and learn from their peers.

A Montessori classroom is staffed by two adults, at least one of whom is trained as a Montessori teacher. Students work with materials individually, or more often in pairs or small groups that provide opportunities for student-to-student discussions. Students have an increasing level of choice in scheduling which lessons to engage in at what times—although they are expected to complete specific lessons, they may choose to work on this lesson in the morning, that lesson in the afternoon, or as they get older, this lesson one day and that lesson the next. The opportunities to choose activities and discuss with peers foster skills for independent learning and time management.

A distinctive feature of a Montessori school is the celebration of cultural and global awareness. The immediate and extended families of Montessori students are an integral part of the school culture. Their expertise about their personal culture and unique experiences provide breadth and depth to the curriculum resulting in the development of empathy and multicultural appreciation.

c. Briefly describe the plan to improve student learning for *all* students, including exceptional children, English language learners, gifted learners, migrant and homeless children, and any other special student populations.

Because the Montessori Method is often viewed by parents as an alternative to the traditional classroom (whether their child be gifted, have some exceptionalities, or are English Language Learners), we anticipate a diverse population of students. The Montessori method accommodates the varied needs of learners by providing a personalized learning approach allowing students to explore and achieve at their own pace and opportunities for students to test their learning through practical application. Students interact with peers in multi-age classrooms to gain different perspectives on problem solving and relationships. This approach is particularly effective for students who a) are learning-challenged and need additional time, resources and attention to problem-solving, and/or b) may benefit from opportunities to work with peers and teachers in a personal way. In this fluid environment, students who are gifted have opportunities to explore subjects more deeply, investigate areas of interest, and challenge themselves to constantly achieve their personal best. Students who require more time with

materials or adaptations because of an identified learning need are easily accommodated. Teachers are trained to encourage an open and exploratory classroom yet to intervene and restructure the classroom environment to support each child as an individual.

d. Briefly describe how the school will use assessment to improve student learning.

SMS will hold to the Montessori philosophy of embedded, ongoing assessment in the classroom. Each student is frequently and regularly observed while working with the Montessori materials. Through observation and careful tracking of the student's work, the teacher can assess which skills a child has mastered and determine their readiness to advance in the curriculum. A student who cannot demonstrate mastery with the materials receives additional lessons or alternate approaches until mastery is achieved. In addition, teachers utilize a variety of classroom-based and summative assessment tools to confirm their observations and inform instructional decision making.

5. Leadership and Governance

a. Briefly outline the role of the Board in regards to school governance, academic oversight and fiscal oversight.

The board hires a school leader to manage the day to day work of the school according to the school's mission and philosophy. Management of the school, including oversight of the budget, finances, human resource management, and student and teacher behavior will reside with the school leader who will ultimately report to the Sussex Montessori School Board. The board will establish a monthly meeting process whereby the school leader reports on the academic performance of students and the adherence of the school to the Montessori philosophy. The board will establish a Citizen Budget Oversight Committee and a standing board Finance Committee to monitor the financial viability of the school and to prevent any misuse of funds. The board will also be responsible for its own development in non-profit governance establishing a governance committee that will ensure that new board members are continually provided training and development for their role.

b. Highlight the strengths of the School Leadership team and the proposed Board.

The Sussex Montessori School Founding Board includes leaders who bring diverse skills including district and charter school leadership, Montessori expertise, connections to higher education including teacher preparation and curriculum development, financial, legal, non-profit and human resource management.

The Sussex Montessori School Founding Board has additional expertise in Montessori charter development, public school policy and curriculum from their Advisory Board. Additionally, board members have developed strong relationships with the National Center for Montessori in the Public Sector (NCMPS), The Trust for Learning, Montessori Accreditation Council for Teacher Education, and regional Montessori schools both public and private. The Board has also maintained strong connections with local foundations and corporations: The Longwood

Foundation, Welfare Foundation and Discover Bank join Montessori Works, Inc. in their commitment to the development of a Montessori school in Sussex County and have provided the necessary funding to begin this process.

The depth of expertise and the established relationships of the Sussex Montessori School Founding Board will support the initial stages of SMS, including the identification of an operational board and school leader who will ultimately assume leadership of the school. It is expected that the Operational Board will be comprised of business leaders, educators, parents, legal and government officials who have a keen interest in Montessori as an elementary education option.

- c. **Explain how the governance and management structures will provide for stable, effective governance and leadership throughout the five-year charter term and thus fulfill the school's mission and vision.**

The Sussex Montessori School Founding Board has taken on the responsibility of preparing and submitting the charter application, and in 2018, will take on the three following primary responsibilities:

- Identifying and hiring a school leader
- Identifying and securing a school site
- Identifying and recruiting Sussex Montessori School Operational Board members who will assist as the board transforms from a founding board to the board of an operating charter school

To continue this commitment, the Sussex Montessori School Board Founding Board will identify individuals to serve on the Sussex Montessori School Operational Board in 2019 and beyond who are similarly dedicated to increasing access to Montessori education for children in Delaware. It is expected that the Sussex County residents currently on the Founding Board will continue as Operating Board members providing continuity and history to the governance process.

- d. Identify the critical qualifications, credentials and attributes you have identified for your School Leader.

The preferred candidate for the School Leader will need to have an understanding of the unique intersection of Montessori education in the context of public education. We will seek a leader who has Montessori certification either as a teacher or an administrator. In addition, he or she must also have a demonstrated ability for working with a board to develop strategic plans, monitor the financial needs of the school, and comply with the State of Delaware's policies and legislation as related to charter schools. In the event that a school leader with both of these strengths cannot be found, preference will be given to a school leader who has a strong understanding of running a public school and an appreciation for the Montessori philosophy.

6. Business Plan

Provide a brief overview of the business plan that includes facilities, financial management, transportation, prospective partners, and access to financial resources.

Facilities: Montessori Works has begun the process of facility identification for Sussex Montessori school engaging Mark Chura of Chura & Associates to assist with the identification of a site, securing financing, and project management for construction or repurposing of a site. Montessori Works has identified three potential sites which are described in the application.

Financial Management: Section 1.10 and Attachment 16 depicts the financial needs for Sussex Montessori. We anticipate 260 students to be enrolled in Year 1 while growing to 455 students by Year 4. Except for federally funded programs, the school budgeted only state and local allocations for its operating budget in Years 1-5. The school will meet its 2% contingency requirement. Additional private funds will be sought; however, they will fund supplemental programming and facility choices, and not supplant state and local appropriations for the purposes of operations. We have also provided a budget scenario for 80% of enrollment (208 students). The school will use private contractual services for its accounting, legal and audit services, and for its start-up operations.

Transportation: Due to the rural nature of Sussex County, we anticipate that 90 percent of students will require longer distances to get to school. The average commute time in Sussex County is 25.2 minutes. We anticipate utilizing local private bus transportation, or potentially purchasing our own vehicles and providing transportation to our students.

Prospective Partners: Montessori Works, Inc. will continue to partner with Sussex Montessori School to support the start-up of the school, to enhance community engagement, to build a teacher pipeline, and to provide guidance and support in the implementation of the Montessori approach. Sussex Montessori School will also partner with First State Montessori Academy as an successful example of a Montessori charter school in Delaware and with national partners such as the National Center for Montessori in the Public Sector.

Financial Resources - Throughout the process leading to the development of this charter application, Montessori Works has received funding from the Longwood Foundation, the Welfare Foundation, and Discover Bank to initiate the charter application and engage the community in conversation about the school. Sussex Montessori School will build on these and other relationships for the benefit of the school. Currently, upon approval of the application, Sussex Montessori School will receive \$350,000 from the Longwood Foundation and is encouraged to apply for another \$500,000 in the March funding cycle. These funds will secure a school leader and provide funding for the facility. In addition, the Welfare Foundation has provided a letter of support. Separately from this funding, Montessori Works has received funding from the Longwood Foundation to continue to support the start-up of the school during the application review process. Montessori works will engage Horizon Philanthropic in a

fund-raising campaign in Sussex County. It is expected that as the charter is approved; this local campaign will provide additional support for the facility and classroom materials.

1.2 Founding Group and School Leadership

14 Del. C. § 512(1)

Founding Group Membership [14 Del. C. § 512(1)]

- a. **Identify the key members of the Founding Group for the proposed school. Identify *only* those individuals who will play a substantial ongoing role in school development, governance, and/or management, and will thus share responsibility for the school. These may include proposed Board members, school leaders/management, staff members, or other essential partners.**

Explain what role each individual will play, and note which Founding Group members are certified educators, parents, and members of the community as required by 14 Del. C. § 512(1).

The founding group of Sussex Montessori School is equivalent to the Sussex Montessori School Founding Board (SMS Founding Board). The history of Sussex Montessori School began with another board, the Montessori Works, Inc. Board (MW Board). In 2014, Montessori Works applied to and received from the Longwood Foundation a grant, with conditions on matching funds, to explore the creation of a Montessori school in western Sussex County. The Longwood Foundation expressed interest in providing greater accessibility and opportunity for educational choices in an area of the state which has experienced significant economic and social impacts.

The SMS Founding Board will be made up of members of the MW Board, as follows:

Chair: Linda Zankowsky, Ed.D.

Dr. Zankowsky is the Interim Director of the Early Learning Center at the University of Delaware and Assistant Professor in the College of Education and Human Development, Department of Human Development and Family studies. Prior to her current position, Dr. Zankowsky provided leadership to the Office of Clinical Studies at the University of Delaware, which annually places approximately 1600 students in field placements in area schools. Dr. Zankowsky has 33 years of experience as a Reading Specialist, classroom teacher, and leader in Delaware public and independent schools. Dr. Zankowsky has the following Delaware certifications: Certified Central Office Personnel, Elementary Teacher, Teacher of Middle School English/Language Arts, Principal/Assistant Principal, Reading Specialist, Superintendent or Assistant Superintendent. In the 1990s she served as principal at Townsend Elementary School in the Appoquinimink School District and at Mt. Pleasant Elementary School in the Brandywine school District. In 2000, Dr. Zankowsky became the Head of Wilmington Montessori School. Dr. Zankowsky's focus has been on leadership development, literacy and assessment, social curriculum in schools, and building professional learning communities. Her Doctoral Position Paper focuses on classroom-based assessment in literacy. She has served as an adjunct instructor at the University, has consulted with schools and presented nationally on assessment in literacy. Dr. Zankowsky has served on various state committees focused on early childhood education and

curriculum development. In addition to her role as board chair, Dr. Zankowsky will provide guidance in hiring Montessori teachers and leadership for the school and in curriculum and instructional practices.

Co-Vice Chair: Christine Carrino Gorowara, Ph.D.

Dr. Gorowara is the interim director of the Delaware Center for Teacher Education at the University of Delaware. She was previously a vice president at the Council for the Accreditation of Educator Preparation and at the Teacher Education Accreditation Council. Her children attended Elementary Workshop Montessori School. Dr. Gorowara provides support for the teacher pipeline work of Montessori Works and is involved in development of a Montessori Training program. Her experience with certification and accreditation will ensure that SMS has well-qualified Montessori certified teachers.

Co-Vice Chair: Patricia Hermance

Ms. Hermance is currently the director of an educator professional development program at the University of Delaware. Previously, she served as the Head of School for Campus Community Charter School for seven years. Her experience in this role brings strength to our founding board around the charter application process and the charter school operations. Ms. Hermance is certified in Delaware as a teacher of Elementary K-8, teacher of Middle Level English and Social Studies, and a teacher of Nursery/Kindergarten.

Treasurer: Mark Conces

Mr. Conces is a senior vice president at Santander Bank and former treasurer of the board of Wilmington Montessori School, which his children attended. Mr. Conces has had senior management roles in Finance, Marketing and General Management at a number of large companies, including JP Morgan Chase, Honeywell and Citizens Bank.

Secretary: E. McCrae Harrison

E. McCrae Harrison has been a Montessori educator since the mid-1980s when she completed her Montessori 6 – 9 (1st, 2nd, 3rd grade) certification at the Center for Montessori Teacher Education in New Rochelle, NY. She began her career at the Elementary Workshop Montessori School in Wilmington, DE, where she worked for 29 years, and now works at the Montessori Academy at Christina, the first public Montessori program in the state of Delaware. Ms. Harrison is active in the local and national Montessori communities. She is the board secretary for both the Montessori Teachers' Association of Delaware, an organization tasked with providing professional development opportunities for teachers and connections into the Montessori community for parents and others, and for Montessori Works, the organization providing the founding support to Sussex Montessori School. Ms. Harrison is also the chair of the American Montessori Society's (AMS) School Accreditation Commission and is the commission's representative board member to the AMS Board. Certified Teacher of Elementary, Principal/Assistant Principal, Teacher of Middle Level English and Social Studies. Ms. Harrison will provide leadership related to the implementation of the Montessori approach and curriculum in a public school.

Jessica Crampton Bradley

A native Delawarean with a Masters in Elementary Education, Bradley was born in Lewes, grew up in Centreville, and has resided in western Sussex County for over 20 years, where she raised her two sons. Now back in Lewes, her southern Delaware roots run deep as her mother and father were, respectively, from Roxana and Dagsboro, and many members of her family are still scattered throughout the county. Currently she works as a full-time realtor for Jack Lingo, but maintains a strong community focus, particularly regarding children in Sussex. In addition to her strong community engagement ties, Ms. Crampton-Bradley provides leadership on identifying and negotiating for a school site.

Jesse Reeves

Jesse Reeves serves as Director of Legal Recruiting at Barnes & Thornburg, where he oversees the recruiting of lateral partners, of counsel, associates, staff attorneys, and patent agents. He provides leadership and vision in the development and implementation of recruiting priorities and strategies. With more than 25 years of legal recruiting experience, Mr. Reeves works to enhance the firm's lateral recruiting initiatives by attracting talented partners, associates and other legal professionals to the firm. He works with firm leadership and office managing partners in firmwide recruiting and retention efforts to support our focus on client needs and strategic national growth. Active in the community, Mr. Reeves is the board member of Montessori Works and is the board president of SmartDrive, which focuses on prevention of teen driving accidents. Mr. Reeves is a graduate of Virginia Polytechnic Institute and State University, where he earned a B.A. in 1987. Mr. Reeves brings strengths in community relationships and in human resources to the school.

Scott Richardson, Ph.D.

Dr. Richardson, Ph.D. has dual Pennsylvania certification in Elementary (K-6) and Special Education (K-12), and a Ph.D. in Education from the University of Delaware. He has held leadership positions as the Assistant Director of Education at New Story of Lancaster (serving students with autism and emotional/behavioral disorders who have been underserved/unsuccessful in their home school districts), and Director of Education at The Stone Independent School. He has expertise in special education, diversity, and alternative/various pedagogical models. Among his many experiences, he has:

- taught nearly all levels of schooling (K-12 special education and higher/adult education) in the U.S./abroad
- served as an administrator/supervisor of special and regular education faculty
- supervised approximately 1,100 pre-service and 350 in-service teachers in elementary/middle/high school general and special education classrooms
- designed and taught undergraduate/graduate/doctoral seminars
- published two books, two invited book chapters, and eight scholarly articles
- served on the journal review board for the Journal of the American Association for the Advancement of Curriculum Studies
- presented at more than thirty international academic conferences

- built relationships between school districts, service providers, and external non/for-profit organizations resulting in dynamic community programs for student and their families
- served on the boards of Montessori Works of Delaware and Pennsylvania Montessori Alliance, and as a task force member for the Montessori Inclusion Endorsement Task Force for the American Montessori Society

Mr. Richardson’s special education background will assist the school leader in addressing the legal requirements of serving special education children.

Sean Steward

Mr. Steward is a licensed Realtor with Home Team Realty and co-owner of Infiniti Transportation LLC in Bridgeville. He also serves as a board member of the Sussex County Association of Realtors and is past director of Delaware Association of Realtors. Mr. Steward was instrumental in securing Board members and helping Montessori Works build relationships in Sussex County in support of Sussex Montessori School. He will assist with locating the site for the school.

b. Explain the Founding Group’s collective qualifications for establishing a high-quality charter school in Delaware and in assuming stewardship of public funds. Address the following in your response.

- **Experience and/or involvement in K -12 public education system;**

Three of the Sussex Montessori School board members have significant experience in the K-12 public education system and are certified as school/district leaders or teachers:

- Linda Zankowsky has served as a teacher, reading specialist, and principal
- Trish Hermance also served as a teacher and has led a Delaware charter school
- McCrae Harrison has teaching experience, including in the first public Montessori program in Delaware, has served as an independent school leader and has provided public school administrative support.

In addition, Scott Richardson is a current teacher of special education, and Christine Carrino Gorowara leads the center at the University of Delaware that partners with school districts and has served on Delaware Department of Education committees focusing on K-12 public education, including the Licensure and Certification Criteria Committee and Excellent Educators for All.

- **Experience in the design and operation of a charter school (if the school has closed or is slated for closure, non-renewal, or dissolution, describe the circumstances that led to such closure, non-renewal, or dissolution);**

Founding board member, Trish Hermance, led a successful Delaware charter school for seven years. In addition, several of the founding board members, Linda Zankowsky and

McCrae Harrison, were active in the writing and development of the charter application for First State Montessori Academy.

Montessori Works, the organization providing the founding support to Sussex Montessori School, has networked with other Delaware charter school leaders to receive guidance on various aspects of the charter application particularly related to governance and finances. Specifically, Montessori Works has retained Brett Taylor of Delaware STEM Academy as a consultant on the application process. Mr. Taylor's knowledge of the state financial system and his understanding of the challenges involved in establishing a charter school have helped the founding board of Sussex Montessori School to plan for and potentially avoid various challenges experienced by other charter schools. Kendall Massett of the Delaware Charter School Network and several Delaware charter school officials have provided guidance and given feedback on the Sussex Montessori School application. In addition, Montessori Works has several advisory board members from First State Montessori Academy, including Yvonne Nass, FSMA Board Chair. This strong and growing network will continue to be resource for Sussex Montessori School's founding and future operating board.

- **School leadership, administration, and governance;**

All Sussex Montessori School founding board members have non-profit governance experience on various boards as outlined above.

Linda Zankowsky has experience as a public-school principal in the Appoquinimink and Brandywine School Districts as well as the school leader of Wilmington Montessori School a non-profit independent school. Trish Hermance served as a Delaware charter school leader and McCrae Harrison served as the Head of School for the Elementary Workshop Montessori School, a non-profit independent school. In all three circumstances, these founding board members have worked in leadership positions with governing boards and understand the distinct roles that the school administration, founding board, and operating board hold to ensure that the mission of Sussex Montessori School is fulfilled and that the school is financially sound.

- **Research based curriculum and instructional strategies that will ensure that all students meet or exceed the expectations of the Delaware Content Standards (Common Core State Standards in English language arts and mathematics-and Next Generation Science Standards);**

Linda Zankowsky, Trish Hermance, and McCrae Harrison have planned and developed delivered research-based curriculum and instructional strategies, including the Montessori educational approach, social constructivist education, best practices in literacy, and the Responsive Classroom program. Dr. Zankowsky and Ms. Harrison have had a particular focus on the integration of the Montessori curriculum and approach with the Delaware Content Standards.

- **Business management, including but not limited to Delaware financial and accounting systems and the funding procedures for Delaware charter schools;**

Jesse Reeves, Mark Conces, and Sean Stewart have run small businesses and/or provided financial oversight to independent school boards. Mark Conces is a financial professional and has served as board treasurer for Wilmington Montessori School. Additionally, as noted above, Montessori Works has contracted with Brett Taylor who worked with the Delaware STEM Academy application to consult on financial matters and to provide expertise on the state of Delaware financial and accounting systems.

- **Personnel management;**

As noted above, many board members have managed small businesses, run recruiting businesses, or managed school personnel issues. While school personnel management will be the domain of the school leader; these board members will provide support and guidance in the planning year with personnel related issues. In particular, Jesse Reeves is a staffing professional with extensive experience in recruitment. Linda Zankowsky, Trish Hermance, and McCrae Harrison are experienced with public school personnel matters.

- **Diversity issues, including but not limited to outreach, student enrollment, and instruction;**

- Christine Carrino Gorowara currently chairs a committee at the University of Delaware whose charge is to both recruit and support more diverse teacher candidates and to support the preparation of all UD teacher candidates to increase their competence in working with diverse students. Dr. Gorowara also serves on the Delaware Department of Education's Excellent Educators for All committee as well as the Educator Equity Public Reporting Work Group.

- Jesse Reeves has served on and led groups committed to diversity issues.

- The three board members with school leadership experience provide expertise in meeting the needs of school communities dealing with cultural and economic diversity related to instruction, enrollment, and marketing schools.

- **At-risk populations and children with disabilities, including but not limited to students eligible for special education and related services; English language learners; migrant/homeless students; and other at-risk populations that the school intends to serve;**

- Scott Richardson currently works with students with autism and emotional/behavioral disorders.

- Additionally, as school administrators, Trish Hermance, Linda Zankowsky, and McCrae Harrison have all had experience in serving children with these needs. They understand the regulations and legalities involved in serving a diverse population.

- **School operations, including but not limited to charter school funding/finance, school bus transportation, facilities management, and school lunch/breakfast programs, and health and safety; and**

Again, as school administrators, Trish Hermance, Linda Zankowsky, and McCrae Harrison have all had experience dealing with these issues. In particular, as previously noted, Ms. Hermance has the most direct experience with these issues as related to a public charter school.

- **Parent and community engagement.**

The board members have all been involved in some way in parent and community engagement, particularly over the past year. Sean Steward, a Seaford native, business man, and father of three children and Jessica Campton-Bradley, a longtime resident of Sussex County with family roots there, have a strong network in Sussex County. Montessori Works has also engaged Jim Purcell, a Milford native, to provide support to the Sussex Montessori School founding board with community engagement activities. The Sussex County members of Montessori Works, led by Jessica Crampton-Bradley, have connected with civic and community associations, written newspaper articles and editorials, and met with school and community leaders in Sussex County.

c. Describe the Founding Group’s ties to and knowledge of the proposed school community.

- **Summarize each person’s experience, qualifications, and affiliations that will be directly relevant to developing a high-quality charter school that reflects the school’s mission and vision. Explain why each individual was chosen to participate in this Founding Group.**

Linda Zankowsky (Board Chair) brings expertise in school leadership, curriculum design and implementation, Montessori education, and the public-school world. She is affiliated with the Montessori Public Policy Initiative, National Association for Montessori in the Public Sector, the American Montessori Society, the Montessori Accreditation Council for Teacher Education, and the University of Delaware, and is an advisory board member for First State Montessori School. These affiliations and Dr. Zankowsky's knowledge of Montessori and traditional education in Delaware will support the curriculum development, identification of a school leader, and development of a Montessori teacher pipeline in development with the College of Education and Human Development at the University of Delaware.

Christine Carrino Gorowara (Board Co-Vice Chair) is committed to quality education beginning at the earliest levels and has guided this board's work all along. Her affiliation with the University of Delaware, experience as a vice president of the Council for the Accreditation of Educator Preparation, and commitment to Montessori education will facilitate the

development of a Montessori teacher training program to support the school with future teachers.

Patricia Stiller Hermance (Board Co-Vice Chair) brings seven years of experience leading a Delaware charter school, which brings strength to the founding board around the charter application process and the charter school operations. Ms. Hermance is certified in Delaware as a teacher of Elementary K-8, teacher of Middle Level English and Social Studies, and a teacher of Nursery/Kindergarten. Her experience as a charter school leader will be especially useful in selecting the Sussex Montessori Head of School.

Mark Conces (Board Treasurer) served for many years as a board member at a large, private Montessori school. This experience has been helpful to this board as it works through founding a new Montessori school in Sussex County. His knowledge of finance and small business structures will ensure the fiscal stability of the school during the founding year.

E. McCrae Harrison (Board Secretary) has been involved in Montessori education as a teacher and administrator for over 30 years in first private and now public Montessori schools in Delaware. Ms. Harrison was a founding board member for First State Montessori Academy and is a current advisory board member for First State Montessori Academy. In addition to her board role for Montessori Works, Ms. Harrison is a Board Member for the Montessori Teachers' Association of Delaware and a commissioner on the American Montessori Society's School Accreditation Commission. Ms. Harrison's Montessori knowledge of Montessori education and its implementation in many schools across the country will support the curriculum and instructional leadership of the school.

Jessica Crampton Bradley is a realtor with deep roots in Sussex County. She has led the community engagement effort, connecting with civic associations, parent groups, and community organizations. Her continuing leadership in this area will expand awareness of Montessori education and the opportunity for a Montessori choice to Sussex families. Ms. Bradley will be leading the search for a school site in Sussex County.

Jesse Reeves will directly serve Sussex Montessori through his experience in staffing, business operations, and board work. These together with his commitment to quality Montessori for under-served populations make him crucial to this board's endeavor.

Scott Richardson is deeply interested in quality education for all types of learners, particularly those with special needs, and his experience in many facets of education make him an integral member of this charter team. He is a member of the American Montessori Society and a former board member of the New School of Lancaster, an AMS accredited Montessori school. He currently works directly with students with autism and emotional/behavioral disorders and provides guidance regarding children with special needs in a Montessori classroom.

Sean Steward has deep roots in Sussex County. He brings these connections and his real estate expertise to this work. He provides direct connections to business leaders and potential

fundere in Sussex County. Mr. Steward will be working with Ms. Bradley to locate a facility and to continue to garner community support for the school.

- **Explain how and why the Founding Group decided to form a school in Delaware.**

Montessori Works started as an idea grounded in fairness. Parents whose children had attended independent Montessori schools in Delaware and Delaware Montessori leaders felt impassioned to start an organization to make Montessori education available for all children in Delaware, at no cost. Started in 2012, Montessori Works is a school development organization founded to increase accessible, authentic, quality Montessori education in Delaware. The board includes Montessori experts, educators, parents, and others who are working to make Montessori programs a more broadly available option in the public arena.

Montessori Works supports the replication of a proven model of education that currently serves children in over 400 public schools in the United States. Montessori Works has close ties to the Montessori Academies at Christina (MAC), which operate on a Montessori school-within-a-school model in two buildings in the Christina School District, as well as to the public charter school First State Montessori Academy (FSMA), with many of the Montessori Works Board members having participated as advisors to the development of the FSMA charter application and curriculum. As educators, parents, and community leaders who are aware of the benefits of the Montessori approach and how it prepares children to be innovative, creative, leaders in the world community, we believe that Montessori education should be accessible to all children in Delaware whose families seek it. As indicated by the two existing public Montessori options in Delaware, Montessori education may be offered within the district structure as well as by independent charter schools.

Montessori Works has led the initiative to start Sussex Montessori School. The founding board of Sussex Montessori School will provide the specific leadership and expertise needed to establish the school.

- d. Provide, as Attachment 1 (Founding Group Résumés and Biographies). Include full résumés (including contact information) and professional biographies (brief narratives) for the individuals named. Label each document with the individual’s affiliation with the proposed school**

We have included the biographies and resumes of all of the SMS Founding Board members in Attachment 1.

Principal/Founding Group, School Leader, and School Leadership Team [14 Del. C. § 512(1)]

Background [14 Del. C. § 512(1)]

Explain the circumstances and motivations that brought the Founding Group together to propose this school.

Motivated to expand Montessori learning in the public domain, Montessori Works applied to and received from the Longwood Foundation a two-year grant, with conditions on matching funds, to explore the creation of a Montessori school that would serve the children of western Sussex County. The Longwood Foundation expressed interest in providing greater accessibility and opportunity for educational choices in an area of the state that has experienced significant economic and social challenges. Western Sussex has a lower income population than the rest of the county, and is demographically more diverse. Achievement scores are demonstrably lower than in the rest of the county. Sussex County also has only one charter school, which is a middle/high school.

Montessori schools across the country (in South Carolina, North Carolina, Ohio, Colorado, Arizona, Minnesota, Wisconsin, to name a few) have demonstrated success working with populations similar to those in western Sussex County. Initially, Montessori Works board members met with interested school district leaders in western Sussex County about their interest in a district-authorized charter. Upon determining that this was not a viable alternative, Montessori Works chose to apply for a state-authorized charter.

Principal/School Leader, Founding Group, and School Leadership Team [14 Del. C. §512 (1)]

1. If the Principal/School Leader candidate has been identified:

- a. Explain why this individual is well qualified to lead the proposed school in achieving its mission and goals. Summarize the proposed leader's academic and organizational track-record. Provide specific evidence that demonstrates the leader's capacity to design, launch, and manage a high performing school. If the School Leader has never run a school, describe any principal leadership training programs that the proposed leader has completed or is currently participating in. (Note! Also provide, as Attachment 2, the qualifications, résumé and professional biography for this individual).**

Sussex Montessori School has not yet identified a school leader, although several individuals have expressed interest (see response in part b. below). The SMS Founding Board includes several experienced school leaders who will be able to provide guidance on choosing a qualified leader. We have included the duties and qualifications of the school leader in Attachment 2.

- b. Provide specific data that demonstrates strong evidence of the school leader's ability to effectively serve the proposed target population.**

The Sussex Montessori School board has identified several possible school leaders, including school leaders with principal and district-level experience in Delaware public schools who have agreed to work with the Sussex Montessori School Board on activities to establish and promote the school. We anticipate that at least one, and possibly all, of these school leaders will apply for the Sussex Montessori School leader position upon approval of the school. Each of the

potential school leaders has roots in Sussex County with a passion for the communities targeted by Sussex Montessori School.

In addition, the Sussex Montessori School Board has established a partnership with Lead Delaware (letter attachment 15), the Delaware Academy for School Leadership at the University of Delaware, the National Center for Montessori in the Public Sector and the American Montessori Society all of which will be accessed to identify a highly qualified school leader.

2. If the candidate is not yet identified, summarize the Board and/or other Founding Group members' academic and organizational performance record and provide specific evidence that demonstrates the Board's ability to effectively serve the proposed target population.

Sussex Montessori School has funding from the Longwood Foundation upon approval for the charter application (attachment 15) that will allow us to hire a school leader for the planning year of 2018-2019. As noted above, we have begun to identify potential school leaders and are prepared to begin the search for a school leader as soon as our charter application is approved.

The founding board knows that the School Leader will need support with the many details and tasks to be completed in the planning year. The Sussex Montessori School founding board has specific areas of expertise to support the school leader:

Governance, Financials, Operating Board:

Jesse Reeves – Coordination of governance issues, such as formulation of the Operating Board, fundraising, consultant arrangements, and non-profit governance and management. Mr. Reeves has been a small business owner, served on the boards of non-profit organizations (see resume), and brings expertise in business management and human resources.

Mark Conces - Provides guidance on financial management, support for fundraising. Mark is a senior vice president at Citizens Bank and former treasurer of the board of Wilmington Montessori School, which his children attended.

Educational Program:

E. McCrae Harrison – Responsible for reviewing all information pertaining to the State standards, curriculum and educational programming for the SMS. Ms. Harrison was the former Head of the Elementary Workshop Montessori School, provided advisement to FSMA on their charter application, and is currently a teacher leader in the Montessori Academy at Christina. As a Delaware certified and Montessori credentialed teacher in the public schools, Ms. Harrison brings a wealth of knowledge of Montessori practice, Common Core Standards, and assessment.

Scott Richardson, PhD, Board Member – Responsible for reviewing program decisions pertaining to special education, ELL, and gifted students. Dr. Richardson is a past Board

member of the New School of Lancaster which is an independent Montessori School. Dr. Richardson's work experience in is school curriculum development, particularly special education.

Trish Hermance - Coordination of all academic information, school structure, teacher and administrative evaluation, and assessment data. Ms. Hermance's background as a leader of a successful Delaware Charter School provides a strong foundation for this work. In addition, her current role at the University of Delaware places her in a position to stay abreast of educational change in Delaware and to maintain important relationships to support this work.

Teacher and Leadership Recruitment:

Linda Zankowsky – Coordination of school leader recruitment, Educational Director, teacher recruitment, Montessori teacher training for future SMS teachers, and liaison with other Montessori organizations. Dr. Zankowsky provided advisement to FSMA on the development of their charter application, led Wilmington Montessori School for 12 years and served a principal in two Delaware Public Schools prior to her current position at the University of Delaware. As shared in her resume, she brings a strong background in school leadership as well as curriculum and instruction. She is currently working with the NCMPS to develop a strong model for training public Montessori teachers in Delaware.

Christine Carrino Gorowara - Dr. Gorowara's experience as a leader nationally in teacher preparation through her work with CAEP and currently at the University of Delaware will guide Montessori Works in developing a local Montessori Training program to support the expanding need for Montessori teachers for SMS as well as other public Montessori programs. Her work at the University of Delaware places her in a unique position to assist potential teachers for SMS with requirements state certification if needed.

Community Engagement and Parent Information/Marketing, Facility Location, Operating Board:

Jessica Crampton- Bradley - Coordination of all community engagement, parent information and marketing in Sussex County in support of the school. Ms. Bradley is a long-time community member in Sussex County. She is intimately familiar with Sussex County. Her deep relationships in the community at large will contribute to the successful marketing of the SMS; her knowledge of real estate will ensure the identification of an appropriate site for the school.

Sean Steward – Coordination of all engagement with business leaders on fundraising activities; civic partners and real estate advisors to determine the location of the school; and candidates for the Operating Board of Directors. Mr. Steward, a Leadership Delaware alum, has strong ties across Sussex County. His work as a small business owner and real estate agent position him ideally to continue to build relationships with key community leaders, raise funds for the school, and identify a location for SMS.

In addition to the above skill set, Montessori Works has acquired funding from the Longwood Foundation that can be used to support the school with consultation services to the school leader as needed.

3. Who will work on a full-time or nearly full-time basis immediately after approval to lead development of the school? How will this person be compensated prior to the school receiving per-pupil funding?

The SMS Founding Board will assume the responsibility for work that will need to be initiated immediately upon approval for Sussex Montessori School. This will be done through a variety of contracted services for which funding has been secured through the Longwood Foundation (letters to Montessori Works and Sussex Montessori School in Attachment 15). In addition, we will work with Horizon Philanthropic (Attachment 15) to continue our efforts to engage the Sussex Community to support the school and through their association with Chura & Associates (Attachment 15) to continue with the identification of, negotiations for, acquisition of financing for the school site as well as ongoing project management for site development and repurposing.

This work will occur in conjunction with the SMS Founding Board hiring the school leader. The Funds for compensating a school leader prior to receiving per-pupil funding have been committed to by the Longwood Foundation (Attachment 15). It is expected that the school leader will be in place by September 2018.

4. Describe the responsibilities and qualifications of the school's leadership/management team (beyond the School Leader). If known, identify the individuals who will fill these positions and provide, as Attachment 3, the qualifications, résumés, and professional biographies for these individuals. If these positions are vacant, explain the timeline, criteria, and process for recruitment and hiring.

It is expected that the school leadership team will be comprised of the Head of School and an Education Director. Financial, budget and facility support will be provided by an outside third party/consultant. Please see Attachment 3 for job descriptions and responsibilities.

Head of School: The Head of School is accountable for the operations of the program and activities of SMS, in keeping with the mission and vision of the school and the direction as set by the SMS Board. The head of school must represent the Board and embody the vision of the school in its relations with faculty, staff, students, families and the community. The preferred candidate for the School Leader will:

- Hold Montessori Certification or have extensive experience with the Montessori philosophy and curriculum
- Have a minimum of 3-5 years of experience working in a Montessori environment preferably as a school or academic leader
- Hold a Master's degree or higher in education or other related field from an accredited institution

- Demonstrate experience with strategic planning
- Comply with the standards for ethical and professional performance established by the State Board of Education
- Demonstrate background knowledge of the fiscal and operating needs of a school
- Actively engage with the students, teachers and parents in supporting the Montessori principles
- Demonstrate a willingness to try innovative approaches to improving student learning

Hiring Process: As noted, SMS has been identifying potential school leaders prior to the application process. The hiring process will begin upon approval of the charter application with an expected start in September 2018. SMS will be open to Heads of School who demonstrate a deep understanding of and value for Montessori education who have public school experience in Delaware or the region. SMS will recruit through the NCMPS, the American Montessori Association, National Charter School Networks, traditional Delaware channels including approved programs in Delaware for alternative routes for school leadership as well as national online recruitment portals such as Indeed.com and LinkedIn.com.

The selection process will involve an initial application and submission of a resume and cover letter; written responses to questions that allow the hiring committee to better understand the candidate's approach to leadership; an initial video or phone interview for candidates who may not live in the area; and an in-person interview for specific candidates who are identified as qualified as finalists for the position.

In the event that the final candidate for the school leader position is not a Montessori Certified candidate, funds have been allocated in the planning year budget and they will be required to attend Montessori Administrative Professional Development which is held in several locations nationally. They will also be provided support through the Montessori leadership development opportunities provided by the National Center for Montessori in the Public Sector which offers online programs for public Montessori School leaders.

Education Director: The Director of Education is responsible for the consistent quality of the Montessori program within and across grade levels at SMS. The Director of Education works directly with teachers to develop, implement, and supervise education programs that meet the schools mission and goals. The focus of this position is on continual development of the staff to ensure that all children are reaching their full potential. The Education Director will report to the Head of School. The Preferred candidate for Education Director will:

- Hold a Master's degree or higher from an accredited institution.
- Have 3-5 years of experience in working in academic administration or related field.
- Have a valid Delaware Teacher's Certification
- Demonstrate experience in creating and evaluating student programs
- Demonstrate experience working with adults in professional development or coaching situations

- Have Montessori Certified Training or extensive experience in with Montessori philosophy and curriculum

This position will be hired by the Head of School with support from the Operating Board during the interviewing and vetting process. It is expected that this position will be filled by July 1, 2019.

Business Management - contractual or employee: The person responsible for the business management of the school (either contractual or as an employee) will work closely with the School Leader to provide reports to the board and Citizens Budget Oversight Committee, ensure that the school is in compliance with all DDOE financial performance standard, provide oversight of contracts such as food services, create and monitor the annual budget, manage payroll, and ensure that the school is financially in a position to fulfill its mission. The firm that SMS contracts or the individual hired will need to have the following qualifications:

- Strong financial and accounting expertise
- Experience with large budgets
- History of ethical financial management
- Certified Public Accountant
- Human resources experience
- Business management experience
- Familiarity with State of Delaware financial system

1.3 Education Plan

14 Del. C. §§ 512(4)-(8) and (11)

The educational program should meet the requirements of 14 Del. C. §§ 512(4), (5), (6) and (7) and applicable regulations.

Curriculum and Instructional Design [14 Del. C. § 512(6)]

1. Provide a synopsis of the proposed educational program, including key components of the education model and any unique or innovative features.

The Montessori Method of education, developed by Dr. Maria Montessori, is a child-centered educational approach based on scientific observations of children from birth to adulthood. Dr. Montessori's Method has been time-tested, with over 100 years of success in diverse cultures throughout the world. While the Montessori Method is being used in schools on six continents, and in 400 + public schools in the United States it is still considered by most to be an innovative and new approach to public education.

Montessori schools are being sought by parents because they are known for their academic rigor while also addressing the development of key skills such as leadership, perseverance, self-efficacy and the ability to work collaboratively among others. These same skills are identified as important to students in Delaware in the Vision 2025 plan for education in Delaware.

Sussex Montessori School has updated the education plan approved by DDOE for the First State Montessori Academy in the 2012 application year with current research and understandings of how the Montessori classroom supports all children. The FSMA plan and updates are reflected throughout this section.

The following are specific characteristics highlighted on the American Montessori Society Website and the National Center of Montessori in the Public Sector outline the key components of the Montessori approach which support an environment that allows for both academic rigor and the personal social and emotional growth of children.

Curriculum/Instruction:

- Learning is aligned with a consistent coherent interdisciplinary curriculum.
- The Montessori curriculum is carefully structured and integrated to demonstrate the connections among the different subject areas focusing on critical thinking, innovation, and communication skills.
- A full complement of Montessori learning materials is meticulously arranged and available for use in an aesthetically pleasing environment.
- Learning takes place through manipulating materials and interacting with others. These meaningful experiences are precursors to the abstract understanding of ideas.

- Children experience sensitive periods, or windows of opportunity, as they grow; teachers match appropriate lessons and materials to these sensitive periods.
- The physical, emotional, social, aesthetic, and cognitive needs and interests of the learner are inseparable and equally important.
- Elementary students organize thinking through the Montessori materials and an interdisciplinary curriculum passing from the concrete to the abstract. Students apply knowledge to real-world experiences.

Environment:

- Montessori schools are based on the premise that children are naturally eager for knowledge and capable of initiating learning in a supportive, thoughtfully prepared learning environment.
- Multiage groupings are a hallmark of the Montessori Method: younger children learn from older children; older children reinforce their learning by teaching concepts they have already mastered mirroring the real world
- The teacher, child, and environment create a learning triangle. The classroom is prepared by the teacher to encourage independence, freedom within limits, and a sense of order. The child, through individual choice, makes use of what the environment offers interacting with the teacher for support or guidance as needed.
- Montessori schools are warm, supportive communities of students, teachers, and parents. Montessori education consciously teaches children to be kind and peaceful.
- Students in Montessori schools are encouraged to learn from their mistakes. It is this environment that promotes inquisitiveness and innovative thinking.
- Montessori students learn to collaborate and work together in learning and on major projects. They strive for their personal best.

REFERENCES

- Adams, K. (2005). "Sources of innovation and creativity". A paper commissioned by the National Center on Education and the Economy. Accessed 10/26/2011 at <http://www.fpspi.org/Pdf/InnovCreativity.pdf>.
- American Montessori Society Website; Retrieved from <https://amshq.org/Montessori-Education/Introduction-to-Montessori> .
- National Center for Montessori in the Public Center Website; Retrieved from <http://www.public-montessori.org/what-public-montessori> .

2. **Provide a synopsis of how the proposed instructional design reflects the needs of the school's target population, and how *all* students will meet or exceed the expectations of the Delaware Content Standards (English Language Arts, Mathematics, Next Generation Science Standards, Social Studies, Health, Physical Education, Visual and Performing Arts, and World Languages). The Delaware Content Standards are available at: <http://www.doe.k12.de.us/domain/374>**

Synopsis

While the Common Core Standards and Delaware Content Standards align well with the Montessori instructional approach. For example, the Delaware State Standards emphasize the importance of the passage from concrete to abstract understanding. They also emphasize the spiral approach to topics in which concepts are revisited in increasingly greater depth. The standards continually stress the conceptual understanding of key ideas and continually return to key organizing principles and procedural skills that structure those ideas. Each of the procedural skills are addressed in Montessori materials such as the Ten Bead Bars, the Short Bead Stair, the Tens Board, and the Golden Beads, the Moveable Alphabet, the Sandpaper Letters, to name a few (Montessori Compass).

The design of the Montessori classroom ensures that all children including ELL, special education students, and other children typically viewed as at risk will meet or exceed the expectations of the Delaware Content Standards. Specifically, the following are ways that ensure that all children are academically and socially successful in a Montessori classroom:

- Mixed age groups require a full array of materials at different levels for all children to access easily. This makes instruction easy to differentiate for all children.
- The entire approach is one of Small group and one-on-one work accommodating the various needs of individual children.
- Uninterrupted 3-hour work periods allow students to persevere with a task, reduce transitions, and allow for the easy integration of any support services in the classroom.
- Montessori Materials support children moving from the concrete to the abstract supporting many children who are not yet ready for the abstraction of paper and pencil concepts.
- All students learn from each other and learn to see differences and individual needs as a normal part of classroom life.
- ELL children can work in Small groups with typically developing students and native English speakers.
- As children are taught to navigate the independence of a Montessori classroom they increase their sense of success and sense of self-efficacy.
- The Montessori teacher is continually observing and assessing children's progress towards learning goals as established in the content standards. They routinely evaluate and reflect on individual children's progress adapting the classroom environment and materials to ensure that each child is successful.

More importantly, there is increasing evidence that students of similar background to the students in Western Sussex County excel in Montessori School environments. The National Center for Montessori in the Public Sector has collected district data from across the country. Specifically, they have found that children attending public Montessori Schools in Milwaukee, Cincinnati, Hartford, Denver, Dallas, and Chicago have performed above proficiency on state

mastery tests in Mathematics and English Language Arts. Of particular interest are the East Dallas Community Schools (2010) now known as Lumin Montessori which has operated two inner-city Montessori schools serving an ethnically and culturally diverse group of primarily low-income families for over thirty years. In comparison to their peers who experience an over 50% drop out rate, the children who attended the East Dallas Montessori program have graduated from high school at a rate of 94%, with 88% attending college. A long-term study of standardized test scores found that third grade students' average scores were in the top 36% nationwide in reading and math (East Dallas Community Schools).

References:

- East Dallas Community Schools Summer Newsletter (2010); Retrieved from: <http://www.public-montessori.org/sites/default/files/resources/EDCS%20Outcomes%20Charts%20and%20Grads.pdf>
- Montessori Compass: Retrieved from <http://montessoricompass.com/blog/common-core-standards-an-opportunity-for-montessori-to-shine>
- National Center for Montessori in the Public Center Website; Retrieved from <http://www.public-montessori.org/what-public-montessori> .

- a. **The description of the instructional design should include, as appropriate, the educational approach (or approaches), including class size and structure, teaching methods with a supporting research base, technology integration for all grades to be served, and how the design relates to the mission of the school.**

The Mission of the SMS is to nurture the development of empathetic, collaborative, persistent and innovative global and community leaders in accordance with the time-tested philosophy of Maria Montessori. The Montessori approach dates back to 1907, when Dr. Montessori opened the Casa dei Bambini, or Children's House, in a low-income district of Rome. Her unique philosophy sparked the interest of educators worldwide. A century later, there are more than 5,000 private, 500 + public and charter Montessori schools in the United States, and over 22,000 worldwide. Maria Montessori based her educational methods on scientific observation of children's learning processes, from birth through adulthood. Guided by her discovery that children teach themselves, Dr. Montessori designed a "prepared environment" (classroom) in which children could freely choose from a number of developmentally appropriate activities.

The strength of Montessori Schools is that they encompass the components of personalized learning and of classrooms that support creativity and innovation. Montessori trained teachers understand exactly how to support children's personalized learning. Kristen Vogt (2016) on The Next Gen learning website and Carri Schneider (2012) provide research and explanations of how Montessori is connected to personalized learning. The following are a few highlights from this work.

- Student grouping that is dynamic, flexible, and responsive to student needs and based on data. In Montessori classrooms, this is the day to day process as teachers continually

observe students as learners and serve as a resource to assist the child in making a constructive connection with the environment, with others in the classroom, and to show the children how to use the materials that form the curriculum in the Montessori classroom. Teachers spend considerable time observing the classroom individual children to inform instructional decisions that are responsive to children's needs. This is the heart of personalized learning.

The multiage classrooms typically are comprised of 24 to 26 children across two to three grade spans. Sussex Montessori will have a lead Montessori and State Certified teacher in each classroom as well as an assistant teacher. This structure allows for children to get the appropriate support from the adults in the classroom while maximizing the opportunity for children to learn and work collaboratively. The teachers are not the only experts in these classrooms; children have many opportunities to learn from each other.

- Students have learning space that supports personalized learning. Teachers provide environments where students have the freedom and the tools to pursue answers to their own questions while continually building their knowledge base in a variety of subject areas. Early access and instruction in the use of research tools broaden the possibilities for self-learning. A key premise of the Montessori approach is that knowledge is constructed from experience rather than delivered in a teacher centered classroom. The role of the teacher is to prepare an environment where children can access materials and opportunities to construct their understanding. Montessori students enjoy freedom within limits. Working within parameters set by their teachers, students are active participants in deciding what their focus of learning will be. They are free to advance through the curriculum at their pace guided by the teacher and an individualized learning plan. This develops internal satisfaction that drives the child's curiosity and interest and results in joyous learning that is sustainable over a lifetime.
- Students discuss data and receive continual feedback. In Montessori classrooms students focus on their personalized best. They learn to reflect on their own learning, their own products, and to determine their next steps. Montessori students use this data with their teachers to set their own personalized learning goals and work plan for the week. The feedback is immediate and on-going. Montessori lessons are set up to give students the chance to learn from mistakes in real-time and to self-check their progress as they work alone or with peers.

Self-correction and self-assessment are an integral part of the Montessori classroom approach. As they mature, students learn to look critically at their work, and become adept at recognizing, correcting, and learning from their errors. Additionally, children become comfortable in providing constructive feedback to their peers in effort to work out social and academic problems.

- Competency Based Learning. Montessori teachers provide lessons with materials that individual learners demonstrate that they are ready for. This readiness is the result of mastering a material that develops a concept that is required for mastering the next material in the sequence. Montessori classrooms provide for exploration of abstract concepts through carefully sequenced concrete materials designed to support the move to abstract thinking. The materials are hierarchical and recursive. This is the heart of competency based learning. Learning is student centered and motivation is high.
- Hands on Didactic learning. Unlike competency based learning in schools relying on technology as a delivery model, Montessori classrooms actively engage children in learning using their hands to manipulate materials.
- Technology is not the tool for personalized learning in Montessori schools; personalization is created by the teacher, the children and the classroom environment. Rather, technology is viewed as a tool to access information, construct knowledge, and to organize and communicate ideas. The Montessori classroom is ideally suited to support the goals of the International Society of Technology in Education which include the following: *empowered learner, digital citizen, knowledge constructor, innovative designer, computational thinker, creative communicator* and *global collaborator*. Montessori students do not access technology only at specific times of the day, but when they most need to utilize technology to access information, communicate with others, and to develop new ideas. Coding, digital video, blogging, digital communication, and digital products are all easily integrated into the classroom allowing students to participate as a global collaborator and digital citizen with others around the globe.

Many of these same characteristics that are explored in the literature on personalized learning are identified by Karla Adams (2005) in her research on schools that support creativity and innovation. Montessori schools embody all the components of schools that support the development of innovation and creativity. Specifically, they:

- create communities of learners,
- they emphasize intrinsic motivation,
- they focus on “what did you learn” and not “how did you do” – one’s personal best,
- they support interdisciplinary connections across big ideas and essential questions,
- they are classrooms that provide predictability and choice; safe places for children to explore and learn from mistakes, and
- foster self-efficacy through the teacher’s belief that all children are capable and a classroom culture that supports peers in this same belief about each other.
- engage the teacher as guide or facilitator.

This focus leads to the mission of SMS which is the development of empathetic, collaborative, persistent and innovative global and community leaders. In addition, the

Montessori Classroom directly leads to the outcome of college and career ready children as defined by the Common Core Standards:

- Demonstrate Independence; demonstrated through Montessori’s activities in self-choice, open exploration and self-correcting concrete materials.
 - Build strong content knowledge across a wide range of subject matter; demonstrated through the daily choice of activities in practical life, sensory-motor, mathematics, language, science, culture, art, and music as well as through social interactions in a multi-age group setting.
 - Respond to varying demands of audience, task, purpose, and discipline through adaptive communication skills; demonstrated in Montessori’s classroom structure through multi-age groupings, conflict resolution, peer mediation, cultural awareness and sensitivity, and early research.
 - Ability to comprehend as well as critique; fostered in the classroom community as children demonstrate their understanding of the Montessori materials, teach others how to use a material, and work together to challenge each other to do their personal best.
 - Value evidence; demonstrated through the continual focus on “what did you learn”, using evidence to justify one’s thinking, and the focus on self-assessment.
 - Use technology and digital media strategically and capably: as demonstrated through early access to research tools and encouraged problem-solving strategies.
 - Come to understand other perspectives and cultures: as demonstrated through early conflict resolution, a deep focus in the curriculum on culture and how culture impacts the way people participate in the global community.
- Adams, K. (2005). “Sources of innovation and creativity”. A paper commissioned by the National Center on Education and the Economy. Accessed 10/26/2011 at <http://www.fpspi.org/Pdf/InnovCreativity.pdf> .
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 -
- b. Present evidence that the proposed educational program is research-based and has been or will be rigorous, engaging, and effective for the expected student population. If evidence of effectiveness in other schools serving similar populations is not available, explain why the proposed program is likely to succeed with the targeted population.**

There are about 20,000 Montessori schools worldwide with 5,000 in the U.S. (more than 500 of them public schools) (National Center for Montessori in the Public Sector; retrieved December

6, 2017) providing substantial evidence—and demonstrated in academic research—that Montessori schools are highly effective.

A rigorous school, offering rigorous instruction, is defined as an institution “creating an environment in which each student is expected to learn at high levels, each student is supported so he or she can learn at high levels, and each student demonstrates learning at high levels (Blackburn, 2008)” (Blackburn & Williamson, 2013). To achieve rigor requires a thoughtful engineering of the classroom environment that values learning (Williamson & Blackburn, 2010) by encouraging exploration, individualized learning, and engagement—a hallmark of Montessori education. Montessori classrooms provide students with both shared/common project-based learning experiences, as well as individualized “work” that has been assigned according to students’ current academic levels. Each student is provided with rigorous individualized instruction, guidance, and interventions that push them toward acquiring essential content knowledge as well as a development of critical thinking/problem solving skills.

The Montessori approach holds students to high standards and motivates them to *engage* in material, concepts, and the learning environment in new ways. The Great Schools Partnership (2016) defines student engagement as “the degree of attention, curiosity, interest, optimism, and passion that students show when they are learning or being taught, which extends to the level of motivation they have to learn and progress in their education. Generally speaking, the concept of ‘student engagement’ is predicated on the belief that learning improves when students are inquisitive, interested, or inspired, and that learning tends to suffer when students are bored, dispassionate, disaffected, or otherwise ‘disengaged.’” The U.S. Department of Education (retrieved December 4, 2016) noted, that curricular strategies such as project-based and community-based learning leads to “better student engagement because the content is relevant to each student and tailored to their unique learning needs,” and “better student outcomes because the pace of learning is customized to each student.” They note, in particular that “transitioning away from seat time, in favor of a structure that creates flexibility, allows students to progress as they demonstrate mastery of academic content.” Montessori students rarely receives instruction or work to complete in a traditional “seat time” manner. Rather, as suggested, students are engaged via provocation, project and community-based learning, and an organization of their environment to be active seekers of knowledge, employ self-correction and self-assessment, and enlist the collaboration of other students and teachers (American Montessori Society).

As stated above, Montessori education has proven successful in diverse and high poverty communities. Montessori schools—with engagement anchored in rigorous individualized, project and community-based, and inquiry-based learning—establishes a primary culture of high expectations which is “necessary” for academic achievement in high-poverty communities such as Western Sussex (Barth et. al. 1999; Kannapel & Clements, 2005; Ragland et. al., 2002).

The following are selected studies (summarized by the National Center for Montessori in the Public Sector: <http://www.public-montessori.org/resources/does-it-work-what-research-says->

about-montessori-and-student-outcomes) that demonstrate effectiveness in Montessori programs, many in communities similar to Western Sussex:

Dohrmann, K., et. al. (2007), “Outcomes for Students in a Montessori Program: A Longitudinal Study of the Experience in the Milwaukee Public Schools,” *Journal of Research in Childhood Education*, 22(2), 205-217.

This longitudinal study of Milwaukee high school graduates showed that students who had attended Montessori preschool and elementary programs significantly outperformed a peer control group on math/science scores. “In essence,” the study found, “attending a Montessori program from the approximate ages of three to 11 predicts significantly higher mathematics and science standardized test scores in high school.

East Dallas Community Schools: Montessori Outcomes

East Dallas Community Schools operates two inner-city Montessori schools that serve an ethnically and culturally diverse group of primarily low-income families. In over 30 years of using the Montessori approach to education, EDCS has proved that all children, regardless of race or income, can succeed in school when you start young and involve parents. In a neighborhood in which the high school dropout rate is over 50%, children who attend EDCS have graduated from high school at a rate of 94%, with 88% of those graduates attending college. A ten-year study of standardized test scores found that third grade students’ average scores were in the top 36% nationwide in reading and math. Even though many of these children start school without speaking any English, 100% of the children test as fluent in English by the end of the third grade.

Lillard, A. & Else-Quest, N. (Sept. 29, 2006). “Evaluating Montessori Education,” *Science* 131: 1893-94.

Researchers compared Montessori students with students in other school programs, and found that 5-year-old children who completed the three-year cycle in the Montessori preschool program scored higher on both academic and behavioral tests than the control group. The study also found that 12-year-old Montessori students wrote more sophisticated and creative stories and showed a more highly developed sense of community and social skills than students in other programs.

Lillard, A. (2005). *Montessori: The Science Behind the Genius*, New York: Oxford UP.

A comprehensive review of the scientific literature that demonstrates how current research validates Dr. Montessori’s observations about how children learn, particularly with regard to movement and cognition, the detrimental effect on motivation of extrinsic rewards, the beneficial effect of order in the environment, and the academic and emotional benefits of freedom of choice.

Rathunde, K. (Summer 2003) “A Comparison of Montessori and Traditional Middle Schools: Motivation, Quality of Experience, and Social Context,” *The NAMTA Journal* 28.3: pp. 12-52.

This study compared middle school students in Montessori programs with students in traditional middle schools, and found significantly higher student motivation and socialization among the

Montessori students. “There were strong differences suggesting that Montessori students were feeling more active, strong, excited, happy, relaxed, sociable, and proud while engaged in academic work. They were also enjoying themselves more, they were more interested in what they were doing, and they wanted to be doing academic work more than the traditional students.”

Diamond, A. & Lee, K., (Aug. 19, 2011). “Interventions Shown to Aid Executive Function Development in Children 4 to 12 Years Old,” *Science* 333:959-964.

To be successful takes creativity, flexibility, self-control, and discipline. Central to all those are executive functions, including mentally playing with ideas, giving a considered rather than a compulsive response, and staying focused. This review compares research results from various activities and curricula that have been shown to improve children’s executive function, including computerized training, aerobic exercise, martial arts and mindfulness practices, and classroom curricula including Montessori education. In a comparison of curricula and curricula add-ons, the Montessori approach is shown to meet more criteria for the development of executive function for a more extended age group.

Diamond, A. (2010). “The Evidence Base for Improving School Outcomes by Addressing the Whole Child and by Addressing Skills and Attitudes, Not Just Content,” *Early Education and Development*, 2: 780-793.

Dr. Adele Diamond, Professor of Developmental Cognitive Neuroscience at the University of British Columbia, is one of the world’s leading researchers on the development of cognitive function and a supporter of Montessori education. In this article she discusses effective strategies for advancing academic achievement, and advises: “Programs that address the whole child (cognitive, emotional, social and physical needs) are the most successful at improving any single aspect – for good reason. For example, if you want to help children with academic development, you will not realize the best results if you focus only on academic achievement (though at first glance doing that might seem the most efficient strategy); counterintuitively, the most efficient and effective strategy for advancing academic achievement is to also nurture children’s social, emotional, and physical needs.”

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- 3. Provide an overview of the planned curriculum, including, as Attachment 4, 1 scope and sequence per content area per grade band (K-2, 3-5, 6-8, 9-12) the school plans to serve. The scope and sequence documents should identify course outcomes and demonstrate clear alignment with the Delaware Content Standards (English Language Arts, Mathematics, Next Generation Science Standards, Social Studies, Health, Physical Education, Visual and Performing Arts, and World Languages). If the proposed school commits to joining the Science Coalition, then a signed MOU would replace the scope and sequence requirement for Science. If the proposed school commits to joining the Social Studies Coalition, then a signed MOU would replace the scope and sequence requirement for Social Studies.**

Sussex Montessori School will be joining the Science Coalition and the Social Studies Coalition. A signed MOU will be included in the attachments.

SMS will use an updated version of the education plan approved by DDOE for the First State Montessori Academy in their 2012 application with current research and understandings of how the Montessori classroom supports all children. The curriculum maps (scope and sequence) found in attachment 4 are the documents approved for FSMA by the state of Delaware on the DDOE site for approved charter applications. These curriculum maps are aligned to essential questions and big ideas as outlined in the Delaware State Standards. By the nature of the Montessori approach, the scope and sequence is not a month by month or week by week document. This would defeat the goal of personalized learning as outlined in the research above. It instead serves as a guide for the classroom teacher to monitor children's explorations of the essential questions, big ideas, and underlying conceptual understandings in each content area. The following modeled on the First State Montessori application provides an overview of the curriculum in each content area. The following modeled on the First State Montessori application provides an overview of the curriculum in each content area.

The Montessori curriculum is carefully structured and integrated to demonstrate the connections among the different subject through these key ideas:

- **Unity of Human Beings:** Students develop an understanding of the similarities and differences of cultures across the world; that people interact with the natural world in distinct ways that produce cultural uniqueness; that people, places, and environments are integrated; that life involves producing and consuming.
- **Unity of all Living Things on Earth:** Students gain an understanding of the development of life on earth. They will explore how living organisms, through time, met their needs for survival, responded to the changes in their surroundings, and contributed to the development of other living organisms. Students will discover and develop a respect for the beauty and wonder of nature. Montessori instills in students a love for the natural world. Natural science and outdoor education are important elements of our children's experience. They develop an understanding of how, through science, we learn how nature works.
- **Unity of the Universe Itself:** Students develop an understanding of their relationship and place in the development of the universe; how the earth has changed over time through physical, chemical, and geological processes.

Because Maria Montessori framed the curriculum with essential questions and big ideas, it is natural for the Montessori teacher to prepare for units with the format of Understanding by Design as developed by Grant Wiggins. The Montessori curriculum is carefully structured and integrated to demonstrate the connections among the different subject areas. Through these curriculum units students are taken on a journey which integrates the Delaware Science and Social Studies standards, as well as various Common Core speaking and listening, writing, reading, and mathematics standards.

Math: The self-correcting math materials sequentially highlight isolated concepts moving from more concrete ideas to more abstract ideas. Math is connected to other parts of the

curriculum; for example, the study of time leads naturally to the study of History and the study of evolution in Biology. Considered as a unique branch of mathematics, geometry is given expanded emphasis in the Montessori curriculum. These Montessori hands-on materials augmented by replacement units from materials such as TERC investigations provide a rich and comprehensive math program covering all of the math strands as well as the big ideas of mathematical problem solving and communication.

English Language Arts in the integrated Montessori curriculum includes the History of Language, Parts of Speech, Sentence Analysis, Written Composition, Reading, Literature Study, Oral Language and Creative Drama. At all age levels in the Montessori classroom, there is emphasis on discussion, free-speech bounded by the classroom rules, and on oral reports given to various individuals, and group projects. The goal of the Montessori ELA area is to promote the use of language as part of reasoned thought. Instruction in Reading involves a balanced approach with an emphasis on the development of phonemic awareness and phonics as well as vocabulary and comprehension.

Science and Social Studies: While SMS will be joining the Science and Social Studies Coalitions, it is important to understand how the big ideas in these subject areas are supported by the coalitions units and instructional practices. As explained above, the Montessori Curriculum is integrated around major concepts of understanding. At the Elementary levels, science and social science topics such as anthropology, astronomy, biology, botany, chemistry, civics, economics, geography, geology, government, history, politics and sociology are not only treated as discrete topics but are interwoven in the curriculum. History provides the framework which gives order to the information acquired in the other areas. Biology gives the children a system of classification to structure and relate facts. Geography shows how the physical configurations of the earth contribute to the history of all people.

Because the Montessori Philosophy encourages exploration and hands-on learning, the community and environment are natural extensions of the classroom. Each subject area can be enhanced through field trips: to farms, marshes, beaches, quarries, museums, zoos, etc. so that instead of merely reading about rocks or amphibians, children have actual first-hand experience with them. The Sussex community allows for a rich exploration of agriculture, land conservation, and beach environments.

- 4. Provide, as Attachment 5, 1 Mathematics unit with corresponding summative assessment and scoring rubrics, and 1 English Language Arts (ELA) unit with corresponding summative assessment and scoring rubrics to demonstrate alignment of instruction to the Delaware Content Standards. If the proposed school does not intend to join the Delaware Science or Social Studies Coalitions, then 1 Science unit and 1 Social Studies unit with corresponding summative assessments and scoring rubrics to demonstrate alignment of instruction to the Next Generation Science Standards and Delaware Social Studies Content Standards are also required.**

See attachment 5**5. Describe how the school will ensure that all students have equitable access to the curriculum.**

As an open enrollment school, Sussex Montessori welcomes students of all aptitudes and needs. As shared above, the Montessori curriculum is based on the needs of the students and not on “dishing out curriculum” because of the child’s grade level. The classroom is designed to allow children to explore various areas throughout an extended work period. A full range of materials for English Language Arts, Math, Science and Social Studies are available throughout the day and are easily accessible to children during this work period. This creates a unique situation where all students in Montessori classrooms have access to all areas of the curriculum throughout the day unlike the traditional teacher centered classroom.

The Montessori curriculum allows for teachers to be aware of the needs of each student, guiding them through the learning process based on the student’s innate desire to learn. In many cases, students can pick those activities for which they are most comfortable. Since the classes are multi-aged, students working in different modalities, with different content and at different paces is not unusual. Teachers assist students to develop and monitor a daily work plan for younger children and a weekly plan for older children. Teachers discuss the child’s strengths and challenges with them helping them to build a plan that both builds on their strengths and develops their challenges. Some children will need more guidance and introduction to the choices in a Montessori classroom than others. They will need modified work plans and other structures to help them learn to manage the independence of the classroom. Some may need modifications of the materials to ensure that they are able to work successfully with them. These are all a natural part of the Montessori classroom environment.

Sussex Montessori teachers will have received specialized training in the unique observation and pedagogy necessary to insure that ALL students in their classroom are able to access the curriculum and ultimately reach the required level of proficiency. In addition, it is expected that the Sussex Montessori School teachers will receive support from the Shelton School in Texas which has been providing specific training to teachers working with learning different children for over 35 years. Any lessons learned by our colleagues at First State Montessori in Wilmington will also be considered.

6. Describe the methods and systems that teachers will use to provide differentiated instruction to meet the needs of all students, including those who are gifted and talented.

The primary approach to working with all children in a Montessori classroom is one of inclusion and differentiation. The Montessori classroom naturally supports this model for all children because:

- The classroom provides a full array of materials to support children across multi-grade levels. The nature of Montessori materials is such that they are designed to support a first exploration of a concept, a later relation of that concept to a more abstract understating and a final abstract understanding of a concept. In this way, one materials such as the binomial cube can support a child at various stages of understanding. Some children will explore the cube as a puzzle to be put together. Others will begin to receive lessons using the cube to help them solve mathematical challenges. Finally, students move to being able to approach mathematical challenges related to binomials with paper and pencil (full abstract thinking). All children can access this material at their developmental level.
- The primary focus of instruction is one-to-one and small group lessons tailored to the needs of the children. Teachers group and regroup children based on their observations, the children's interests, and their learning goals. When needed, teachers with special education certification, speech therapists, and others may join a classroom to support the individual needs of children. These therapists work side by side with the other teachers and children in the classroom easily fitting in to the classroom design with Small group and individual lessons designed to support a particular need of a child.
- This model of inclusion supports the social and emotional needs of all children as well. Gifted students consolidate their understanding of concepts as they consider how to explain ideas to other students in the classroom while also having the independence to explore new ideas and grow themselves in areas of interest to them. Exceptional and ELL students learn from all children in the classroom creating friendships and an appreciation and reducing social stigmas across the classroom community.
- Transitions are reduced as accommodations are made to support individual children within the classroom environment thereby maximizing learning and instructional time.

The rare exception to the inclusion approach to meeting the needs of all children in a Montessori classroom would one of the following:

- The child is highly distracted and benefits from having the first lessons with a material given in a separate environment before working with it in the classroom.
- A child with emotional outbursts who needs a quiet place to regain his or her composure before returning to work in the classroom.

In either case, the goal is to support the child so that they can learn to navigate the Montessori classroom developing self-regulation and independence.

7. Provide a synopsis of plans for additional academic support for at-risk students, including a description of how the school plans to implement procedures to determine whether a student responds to scientific, research-based interventions for reading and mathematics.

Working with at-risk students is not unusual for Montessori schools. Based on a sample of schools across the country, public Montessori schools have approximately 47% of their students under free and reduced lunch programs while 51% are Title I schools. Montessori district and

magnet schools, however, have a higher concentration of lower income students, with 55% of students being eligible for free and reduced lunches and 64% being Title I schools.

We anticipate higher than normal concentrations of lower income students in Sussex Montessori due to its location in the western portion of the County. 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. Students will receive individualized assessment of progress to inform their educational plan.

The school will use a response-to-intervention (RTI) which is aligned with the philosophical stance of the Montessori method. Teachers will evaluate students' progress, and makes continuous changes in the environment, materials, or interactions that might better meet the child's needs. As explained by the National Research Center on Learning Disabilities in Understanding Responsiveness to Intervention in Learning Disabilities Determination, the following core features are important and consistent with the Montessori approach:

- high quality research based classroom instruction
- student assessment with classroom focus
- universal screening of academics and behavior
- continuous progress monitoring of students
- implementation of appropriate research-based interventions
- progress monitoring during interventions (effectiveness)
- teaching behavior fidelity measures

SMS will insure that these best practices are integral to our approach. A systematic approach to interacting and intervening with students will combine a multi-tiered assessment approach with a multi-tiered instructional approach. (Outlined in more detail in 1.3 Special Populations and At-Risk Students 2B). Done well, this model will prevent some students from needing to participate in the IEP process and for those that do require an IEP, it will provide data to support the decisions of the Instructional Support Team. Sussex Montessori will use the RTI Essential Components Integrity Rubric (Center on Response to Intervention, 2014) to conduct a biannual review of the Response to Intervention model. This will ensure that SMS continues to adhere to the best practices of RTI.

A multi-tiered process will begin with data gathered via tools for screening, progress monitoring (formative assessment) and diagnosis. The curriculum documents for reading, writing, and mathematics include assessment tools for ongoing daily formative assessment. Also, teacher observations of students, relating to goals for learning, will be noted. An additional means of

assessment is more formal, though easily administered, standardized assessments. These can be used periodically to monitor children's progress. This information will indicate whether a child is or is not "on-track". Thus, the consistent use of specific screening tools and progress monitoring will promote early identification of students who may be at risk for learning difficulties. In this way teachers will have pertinent information to facilitate adapting the educational environment to better support the child.

Sussex Montessori teachers will administer both the DIBELS Reading and Math Assessments during the first two weeks of the school year. It is anticipated that screening will be completed for all children during the first four weeks of the school year. Children identified as potentially have special education needs will be reviewed in September or within two weeks of enrollment with an IEP meeting or IST meeting to follow. In the first few years of operation SMS will administer the identified assessments within two weeks of enrolling all students to ensure that students needing additional intervention, IEP reviews etc. are identified in a timely manner and receiving the interventions most appropriate for their needs.

Teachers at Sussex Montessori will continually monitor progress of children. This will include particular attention to the areas of reading and mathematics (using the curriculum-based tools listed in Attachment 4). The DIBELS Reading assessments and AIMS Web Math Assessments will be administered to children again in January and again in March. This data will be used to monitor the overall progress of children and identify children who may not have been identified in the September screening assessments.

For children who were identified at any time in the school year as needing additional supports, Sussex Montessori will implement a more intensive and regularly scheduled progress monitoring program to ensure that the child is making progress. This progress monitoring will be based on the structure of the three-tiered approach for RTI. (Outlined in more detail in 1.3 Special Populations and At-Risk Students 2B)

Sussex Montessori will contract with an Educational Diagnostician, Speech Pathologist, Occupational Therapist, and will have trained special education and ELL teachers as part of the school staff to support students within the context of the typical classroom as described above.

8. Explain how the graduation requirements will ensure student readiness for college or other post-secondary opportunities (trade school, military service, or entering the workforce).

This is not applicable. Sussex Montessori will not enroll high school students.

Student Performance Goals [14 Del. C. § 512(4) and (6)]

Outline the clearly measurable annual performance status and growth goals that the school will set in order to monitor and evaluate its progress accelerating student achievement.

Respond to the following with regard to the proposed school's student performance goals and the Delaware School Success Framework (DSSF).

1. Describe the student performance standards for the school as a whole.

All students will perform to their creative and intellectual best. The criteria for the student performance is not only to perform well on state standardized tests, but to demonstrate behaviors and attitudes consistent with our mission. At this time, there are not specific reliable and valid assessments for leadership, innovation and responsible global citizenship. As research informs the development of such assessments, SMS will explore their use to measure our mission appropriate outcomes. Specifically, SMS will aim to achieve the following goals:

Performance Goal 1:

SMS will demonstrate that its students are increasing in academic achievement, as measured by the Delaware System of Student Assessments (DeSSA) and other assessment tools as follows:

Target: By the third year of operation, and for each year thereafter, 70 to 89 % of students will make growth sufficient to maintain or achieve proficiency.

Target: by the third year of operation, and for each year thereafter, SMS will have between 60 and 79 % of all students meeting their growth targets.

Target: by the third year of operation, SMS will have between 60 and 79 % of students in the lowest quartile of performance meeting their growth targets.

Target: By the end of the third year, the school's average proficiency rate on DeSSA of reading and math will meet or exceed the statewide average student performance of schools serving the same grades.

Performance Goal 2:

SMS students will exhibit positive behaviors related to academic success through:

Target: Each year the school will have fewer reportable incidents pursuant to Delaware Code, Title 14, Section 4112, then the average for public schools in Sussex County with a similar grade configuration.

Performance Goal 3:

Given SMS's emphasis on the development of character, innovation, and global citizenship each student will:

Achievement Target: Demonstrate growth on the continuums of development in each of these areas as documented by teacher observations, student portfolios, student reflections on their work, and parent surveys documenting their observations of their children's growth in these areas.

Achievement Target: Beginning year three, SMS 6th graders will demonstrate the development of these skills and their academic achievement through a year-long study or service project culminating with a performance presented to the school community.

- 2. In addition to the State’s mandatory assessments, identify the primary interim assessments that the school will use to assess student learning needs and demonstrate academic progress throughout the year. Explain how these interim assessments align with the school’s curriculum, performance goals, and Delaware Content Standards (Common Core State Standards in English Language Arts, Mathematics, and Next Generation Science Standards).**

Observation is a cornerstone of the Montessori Method. Each student is frequently and regularly observed while working with the Montessori materials and while participating in recess and special classes such as art, music, or physical education. The teacher takes notes on the students and records descriptions of learning style, attitudes towards school, habits of concentration, initiative and persistence, abilities to form and sustain friendships, self-discipline, and sense of responsibility to other members of the class and community. Through observation and careful tracking of the student's work with the materials, the teacher can assess which skills a child has mastered and determine their readiness to advance in the curriculum or provide additional supports for those who are challenged.

In practice, the Montessori teacher is trained in a response to intervention model based on daily teacher observations and records, which leads to decisions about the classroom environment, materials needed to support each child, and specific lessons. The quality Montessori school enhances these observations with a comprehensive classroom-based assessment system that monitors and documents outcomes against goals for learning using results to improve learner outcomes and school effectiveness from entry through sixth grade. An effective assessment system to support student growth is one that focuses on multiple classroom-based formative assessments allowing teachers to interact with and observe children individually with tools that focus their observations on specific aspects of learning and development {Salinger, 2001; Zankowsky, 2006}.

With this in mind, Sussex Montessori School will use formative and summative assessments providing tools for progress monitoring, screening, diagnosis, and for program evaluation focusing primarily on the individual development of the child. These assessments will include Montessori classroom-based individual assessments, student portfolios, teacher observations, and anecdotal records, complementing standardized assessments to evaluate individual student progress against the goals for learning and to document programmatic strengths to develop improvement plans. Each academic year's data, including Smarter Balanced results, will be compared to past data to measure current progress, the objective being that each child will meet or exceed their goals for annual yearly progress. The DIBELS Math and ELA Assessments and the TERC Assessments used for progress monitoring are all aligned to Common Core Standards.

Reading/Writing (Please refer to attachment 4 for charts outlining the timing of formative and summative assessments):

Assessment will address the following areas identified in the Common Core State ELA Standards: phonemic awareness, phonics acquisition, fluency, comprehension, vocabulary, self-monitoring, and increased student awareness of meta- cognitive strategies. Sussex Montessori will use the DIBELS and the Developmental Reading Assessment (DRA). In addition, teachers will use running records, think-aloud, reading logs, written retellings and summaries, and spelling assessments.

Assessment in writing will view student writing through the lenses of the six traits of writing; ideas, conventions, word choice, organization, sentence fluency, and voice. A writing continuum will be used to determine where a child is making progress and where he may need additional support. Rubrics available on the DDOE website based on the genre of the Common Core State Standards including Argumentation/Opinion Text based writing, Informational or Explanatory Text Based Writing, and Narrative Text

Math (Please refer to attachment 4 for charts outlining the timing of formative and summative assessments):

In addition to Montessori Lesson Observation, which is designed to allow the teacher to assess a child's progress using standardized Montessori materials, SMS will use a variety of assessments for progress monitoring. As is annotated in the submitted Mathematics unit, SMS teachers will rely on additional information from the TERC Investigations 3 / Connections Assessment Checklists, Portfolios and Embedded Benchmark Assessments. In addition, the DIBELS for Math will be administered 3 times per year.

These classroom-based formative and summative assessments will be used to provide a frame of reference to confirm and enhance the teacher's observations in the classroom. Each assessment will be individually administered. The assessments will be used to inform the next steps for instruction as well as to confirm a teacher's observations that a child may be "at risk" leading to further interventions to support the child.

Integrated Science/Social Studies/ The Montessori Social and Cultural Curriculum:

SMS will use the resources of the Delaware Science and Social Studies Coalitions to monitor progress in these areas. In addition, SMS will use any required state assessments in these areas to evaluate the program, alignment of the curriculum and monitor student achievement. In addition, Montessori classrooms rely on specific classroom performance-based formative and summative assessments. These assessments allow the demonstration of the students' integration of their knowledge in reading, writing, speaking/listening, and mathematics with their developing understanding of the essential questions in these areas. Several specific assessments used in the Montessori classroom are:

- Classroom presentations: Classroom presentations by students enhance planning skills, give opportunities for public speaking, increase confidence, and give children the chance to experience pride in their accomplishments.

- Peer/Reciprocal Teaching: Whether or not a student has sufficient knowledge of a work material to be able to teach it to peers is an important Montessori assessment tool that is employed on a constant basis. Peer teaching allows a child to solidify learning and place the educational gains in a meaningful context aiding long-term retention and the transfer of knowledge.
 - Portfolio: Students at SMS will create electronic portfolios that reflect the development of their understanding of the essential questions embedded in the cultural curriculum. These portfolios will be self-evaluated against rubrics, shared by students with parents, and be a cumulative record of the child's development.
- 3. If the school plans to adopt or develop additional academic performance goals or assessments beyond the State's mandatory assessments, explain what standards the school will use, and describe the adoption or development process that has taken place or will take place. Include the timeline for achievement of student performance goals and the assessment of such performance.**

Sussex Montessori School does not plan to adopt or develop additional academic performance goals beyond the State's mandatory assessments. All assessments listed in question 2 are designed to be formative in nature and will guide instruction and interventions throughout the year.

- 4. Explain the school's policies and standards for promoting students' from one grade to the next. Describe how and when promotion and graduation criteria will be communicated to parents and students.**

Because Montessori Schools are multi-age classrooms, children's individual needs are typically met in a classroom with the appropriate age groupings. Curriculum is not based on the grade that the child is in but on the development and needs of the child to succeed in a classroom with age appropriate peers. Because of this, retention is typically not a consideration in a Montessori School. Parents and teachers work closely to support children; if there was a reason to consider keeping a child in a given age range for an additional year, parents and teachers would work with the Education Director to develop benchmarks (RTI model below) for improvement and goals for the child from mid-year of the last year in the multi-age classroom until the close of the school year when a final mutual decision would be made. The Sussex Montessori School handbook will include a section on promotion and the available supports for a child who may need additional intervention.

- 5. Explain the process for ensuring that all students in grades 8-12 have a complete student success plan. Describe how the success plans will be monitored as required by 14 Del. C. § 5.0.**

Not applicable

High School Graduation Requirements (*High Schools Only*) [14 Del. C. §§ 512(4), (5), (6) and (7)]

1. High schools will be expected to meet the Delaware Graduation Requirements, which may be amended from time to time. The requirements can be found at:

<http://regulations.delaware.gov/AdminCode/title14/500/505.shtml#TopOfPage>

Not applicable

2. Explain how the school will meet these requirements and monitor them through the use of the State's pupil accounting system. Explain how students will earn credit hours, how grade-point averages will be calculated, what information will be on transcripts, and what elective courses will be offered. If graduation requirements for the school will exceed those required by the State of Delaware, explain the additional requirements.

Not applicable

3. If applicable, also explain how the school will meet the requirements for any and all Career and Technical Education (CTE) pathways courses. Requirements include, but are not limited to:

Not applicable

- a. Programs must follow a State-approved Pathway Standard and be of sufficient size and scope to be effective for graduates;
- b. Applications must be approved;
- c. Documented and appropriate labor market opportunities must sufficiently exceed the current training supply;
- d. Laboratory facilities and equipment must meet all safety requirements pursuant to 14 DE Admin. Code § 885 and reflect current industry standards;
- e. Curriculum must follow current standards and include a State-approved end-of-pathway assessment;
- a. Student access to the program must follow the Office of Civil Rights CTE (vocational education) guidelines for admission and recruitment available at: <http://www2.ed.gov/about/offices/list/ocr/docs/vocre.html>;
- f. Pathways must follow an approved Program of Study;
- g. A Program of Study document must be submitted with the application. The state template is available through this link: <http://www.doe.k12.de.us/Page/435>; and
- h. Programs must include student participation in the related Career and Technical Student Organization.

This website will provide further information on Delaware CTE requirements:

<http://www.doe.k12.de.us/Page/435>

- 4. Explain how the school’s graduation requirements will ensure student readiness for college or other postsecondary opportunities (trade school, military service, or entering the workforce).**

Not applicable

School Calendar and Schedule [14 Del. C. § 512(6)]

- 1. Provide, in Attachment 6, the school’s proposed calendar for the first year of operation. Include the length of the school day, as well as start and dismissal times. Explain how the calendar will support the success of the educational program.**

Daily start time is 8:30 am. Children will have an opportunity to have breakfast if desired, settle in to the classroom, and participate in morning meeting. Daily end time is 3:30 pm whereby students will participate in a closing circle in the classroom and transition to transportation or after school activities. It will be a goal of the school to create extended work periods with few transitions during the course of the day in adherence with the Montessori model. The school calendar will be designed to allow for parent conferences after the first six weeks of school to establish common goals for each child, and again when approximately 75% of the year has been completed. Families will receive progress reports at the mid-year point and end of the school year.

Two week long professional development periods are provided in the summer before the first school year to give Sussex Montessori Teachers and Administration adequate time to work on curriculum, ready the classroom environment, and orient themselves to the Sussex Montessori culture. The remaining professional development days are spread throughout the school year and will focus on curriculum/instruction, assessment, and other priorities identified by teacher leaders.

SEE ATTACHMENT 6 - SCHOOL CALENDAR

Supplemental Programming [14 Del. C. § 512(6)]

- 1. Describe the extra- or co-curricular activities or programming the school will offer; how often they will occur; and how they will be funded.**

SMS will be providing after school and camp opportunities for students throughout the year. If a cost is involved, students with financial need will be assisted by a fund established by Sussex Montessori to support all children who wish to participate. Among the types of programming that enhance and support a Montessori approach are:

- Art and Drama Clubs (grades 3 to 5)

- Color Your World (1st – 6th grade): A coloring and design workshop
- Lego Club (1st – 3rd grade)
- P.E. Club (K – 1st grade)
- Open Computer Labs (1st – 6th grade)
- Yoga (3rd – 6th grades)
- Drama Kids Club (1st – 4th grade)
- Choir (3rd – 6th grade)
- International Culture Workshops (3rd – 5th grades)
- Instrumental lessons (3rd-6th grade)
- Odyssey of the Mind
- Cross-age classroom buddies and book clubs

It is expected that most programs will be offered for two sessions of 10 weeks across the school year. Some may be offered for the full year. Sussex Montessori intends to partner with local community agencies to provide daily after school activities to families in need of such services. Application for after school programming grants will be considered as well.

2. Describe the school’s programs or strategies to address student mental, emotional, and social development and health.

SMS will be replicating the Responsive Classroom Approach, a research-based approach to K-8 teaching that focuses on the strong link between academic success and social-emotional learning (SEL). High-quality education for every child is built on the foundation of a safe and joyful learning community. The Responsive Classroom is characterized by for main pillars:

- Engaging Academics - Teachers create learning tasks that are active, interactive, appropriately challenging, purposeful, and connected to students' interests.
- Positive Community - Teachers nurture a sense of belonging, significance, and emotional safety so that students feel comfortable taking risks and working with a variety of peers.
- Effective Management- Teachers create a calm, orderly environment that promotes autonomy and allows students to focus on learning.
- Developmental Awareness - Teachers use knowledge of child development, along with observations of students, to create a developmentally appropriate learning environment.

The principles of Responsive Classroom and the Montessori approach highlight many of the school components identified by the National Association of School Psychologists for supporting students’ social and emotional welfare leading to positive mental health. These include:

- A school wide community emphasizing multi-age opportunities.
- A physical environment that is beautiful and welcoming

- Classrooms that support student engagement matching opportunities for learning to students' abilities, enhancing their self—efficacy, and is under their control. Classrooms where students have choice and help to determine rules, schedules, and what they learn are classrooms that support healthy development.
- Strong teacher – student relationships
- Supportive peer relationships
- Positive home- school relationships
- Parent involvement and support with parenting

Trained in observation, Montessori teachers are particularly adept at noticing when a child is under stress or acting in ways that are subtly different from their normal behaviors. They do not ignore these signs but will often engage the child in conversation to explore and seek to understand what might be happening. Children that have various behavior signs that may seem disruptive to the classroom will be redirected and engaged by Montessori teachers to help them find ways to recognize when they are stressed and alternatives to release that stress.

The Montessori classroom is particularly supportive of children who are under emotional or mental stress because it is predictable and consistent. The routine for the day is clearly established and understood by the child. The expectations of the teacher and logical consequences are understood. When needed, the Montessori teacher will find a way for a child to take a walk to deliver something to another teacher, use a quiet spot in the classroom to regroup, or other such strategy to relieve their stress. Finally, Montessori teachers provide support to all the children in the class with class meetings that emphasize the individual needs of children, how others in the class can support their peers, and ways to handle stress (Williams, B.R., Boyle, K., White, J. M., and Sinko, A., 2010)

Initially, SMS will contract with a local agency to provide guidance support and counseling for students for whom such support is needed. Such services will be offered with parent approval. At such time that the school is fully enrolled through grade 6 a full-time counselor/student support staff member will be considered.

Williams, B.R., Boyle, K., White, J. M., and Sinko, A.(2010). *Children's mental health promotion and support: Strategies for educators*. Retrieved from www.NASPOonline.org .

3. If applicable, describe any other student-focused activities and programs that are integral to your educational and student-development plans.

Not applicable

4. For schools offering summer school. Describe the extra- or co-curricular activities or programming the school will offer, how often they will occur, and how they will be funded. Describe the program(s) to be offered. Identify how many students are expected to attend summer school and how will they be selected for participation. Identify how

many hours and weeks of summer school will you provide, and how will it be funded. Explain how the school will provide Extended School Year services (ESY) for eligible students with disabilities.

Sussex Montessori School does not intend to offer summer school. If a child's IEP calls for Extended School Year Services Sussex Montessori will work with the family to insure the child has access to an appropriate educational setting and program during the summer months. Depending on the child's needs that programming may or may not take place at SMS.

Special Populations and At-Risk Students [14 Del. C. § 512(4)-(7)]

1. At-Risk Students

- a. Identify the special populations and at-risk groups that the school expects to serve, whether through deliberate targeting or otherwise.**

SMS will not deliberately target to serve any particular kind of disability, but expects that a portion of the student's enrolling to attend SMS will be students who have been identified through the special education process. This group of children is likely to have been identified as having learning disabilities, emotional disabilities, speech and language needs, sensory or motor function differences, etc. In addition to children identified as needing special education services, SMS also expects that a significant portion of the student body will be living in poverty. Additionally, Sussex County schools also frequently enroll a large percentage of students for whom English is not their first language. Finally, SMS expects to have some families identified as undocumented immigrants. Each of these groups of students will require support from the Sussex Montessori School teachers, leadership and community. In preparation for providing this support SMS will insure that the staff hired are adequately certified, trained and experienced in these areas. Preference will be given in the hiring process for individuals with certifications, training and/or experience in special education, ELL, trauma informed instruction and/or multilingual.

The Montessori Model is uniquely suited to work with children with disabilities because its method involves individual child identification within the context of the educational program, rather than advancing a curriculum that may not be attune to particular child attributes. Thus, the Montessori model couples naturally with the concept that IDEA was not intended as a "one size fits all" approach ("Gordon, S. "Making Sense of the Inclusion Debate Under IDEA", *BYU Law Journal*, 189-225).

Upon enrollment, SMS faculty/staff will conduct a records retrieval process to efficiently gain access to a student's cumulative record and IEP/504, if applicable, from the sending school. The faculty/staff members will then review all screening results and records review findings and follow established protocols for RTI or IEP implementation. If it is determined that a child needs additional support/intervention SMS faculty will initiate a series of meetings. These meetings will be attended by the SMS Head of School (or designee), Educational Director,

special education teacher(s), other appropriate personnel or consultants to the school (i.e. nurse, counselors, school psychologist (contracted services), etc.), as well as the student's parents. These individuals will comprise the Instructional Support Team (IST). If appropriate they will effect an evaluation of the student and a determination of their eligibility under IDEA 2004. Subsequently, for applicable students, an IEP will be developed and identified services implemented with re-evaluations effected. This team will also be convened upon receipt of records from a sending school indicating that a child shall receive special education services. This meeting will take place within the regulated time frame to insure any modifications needed will be documented before the IEP is implemented at SMS.

SMS will ensure it adheres to statutes related to the identification, evaluation, eligibility and education of children with disabilities.

b. Describe how the school will implement Response to Intervention procedures, including a plan for how data will be collected, progress will be monitored, and instructional decisions made related to student performance in accordance with 14 DE Admin. Code § 925.12.0.

A response to intervention (RTI) model is in alignment with the philosophical stance of the Montessori teacher. The Montessori teacher continually evaluates students' progress, and makes any changes in the environment, materials, or interactions that might better meet the child's needs. The teacher then evaluates those adjustments, making new adjustments as necessary. This is the fundamental concept of Response to Intervention.

As explained by the National Research Center on Learning Disabilities in, [Understanding Responsiveness to Intervention in Learning Disabilities Determination](#), the following core features of a strong RTI are:

- high-quality research-based classroom instruction
- student assessment with classroom focus
- universal screening of academics and behavior
- continuous progress monitoring of students
- implementation of appropriate research-based interventions
- progress monitoring during interventions (effectiveness)
- teaching behavior fidelity measures

SMS will ensure that these best practices are followed. A systematic approach to interacting and intervening with students will combine a multi-tiered assessment approach with a multi-tiered instructional approach. Done well, this model will prevent some students from needing to participate in the IEP process; while for those that do require an IEP, this method will provide data to support the decisions of the Instructional Support Team. SMS will use the RTI Essential Components Integrity Rubric ([National Center on Response to Intervention, 2011](#)) to conduct a biannual review of the Response to Intervention model. This will ensure that SMS continues to adhere to the best practices of RTI.

Assessment

A multi-tiered process will begin with data gathered via tools for screening, progress monitoring (formative assessment) and diagnosis. The curriculum documents for reading, writing, and mathematics include assessment tools for ongoing daily formative assessment. Also, teacher observations of students, relating to goals for learning, will be noted. An additional means of assessment is more formal, though easily administered, standardized assessments. These can be used periodically to monitor children's progress. All the aforementioned will provide information on when a child is "on-track" as well as indication about when a child may be "off-track." Thus, the consistent use of specific screening tools and progress monitoring will promote early identification of students who may be at risk for learning difficulties. In this way teachers will have pertinent information to facilitate adapting the educational environment to better support the child.

The formal screening and progress monitoring assessments include but are not limited to:

- DIBELS Reading Assessments
- DIBELS CBM Mathematics Assessments
- Curriculum Based Measurement in Reading
- Observation Survey of Early Literacy Achievement

Of note, for children that are known to be at risk, SMS teachers will administer both the DIBELS Reading Assessments DIBELS Math Assessment during the first two weeks of the school year. It is anticipated that screening will be completed for all children during the first four weeks of the school year. Children identified as potentially have special education needs will be reviewed in September and a response to intervention plan then developed.

Recognizing that children may fall behind at any point on the learning continuum, the teachers at SMS will continually monitor progress of children. This will include particular attention to the areas of reading and mathematics (using the curriculum-based tools listed in the appendices). For children who were identified at any time in the school year, as needing additional supports, SMS will implement a more intensive and regularly scheduled progress monitoring program to ensure that the child is making progress. This progress monitoring is further defined below in the discussion of the three Tiers. This progress monitoring may lead to the use of specific diagnostic tools in order to better understand why a child may not be making progress.

Ongoing Data Collection

Monitoring of student progress during the RTI and tiered approach will occur in line with that described by Brown-Chidsey, Rachel and Steefe, Mark W. (2005) in *Response to Intervention: Principles and Strategies for Effective Practice*:

- target the skill or behavior of concern addressing specifically its components, its display, and to what degree of intensity it is exhibited.

- establish the settings where the target behavior will be observed and recorded.
- data recording procedures will be established along with assignment of data collection personnel
- monitoring materials will be defined and continued access ensured
- analyze the data collected to determine whether the desired change in skill/behavior has been achieved; and/or to assess whether revision or continuation of the current intervention is appropriate.

SMS teachers will be trained in the collection of data obtained during screenings, observations, and other classroom based assessments. The data from formal formative assessments will be admixed with information from teachers' observations as well as evidence from, other classroom-based assessments (as described in the curriculum documents). Ultimately, the data from these multiple sources will be collected in spreadsheets. Teachers will analyze this information and will then plan appropriate instruction tailored to the child's needs.

Interventions

Interventions will vary widely according to the needs of the child. As stated earlier, Montessori teachers are continually adapting the classroom environment in efforts to meet the educational needs of students. Adaptation tools to assist with writing, ear muffs to assist children in focusing, and ensuring quiet private work areas are among the many interventions that Montessori teachers can implement in order to support individualized learning. Also, SMS teachers will be trained in the "Mind at a Time" model which connects brain research, knowledge of learning styles, and classroom adaptations. In addition, interventions may include but not be limited to:

- focused research-based reading/math curriculums that will supplement the Montessori curriculum. These will include resource sites approved by the DOE such as:
 - <http://www.fcrr.org/>
 - <http://rading.uoregon.edu/>
 - <http://www.ed.gov/rschstat/reasearh/pubs/rigoroussevid/index.html>
 - <http://www.w-w-c.org>
 - <http://www.promisingpractices.net>
- focused small group instruction to promote reading or math skills (120 minutes per week for children below the 25th percentile)
- environmental adaptations such as enhanced classroom work space
- additional support from the school nurse or counselor
- specialized equipment such as e-readers or computer access
- adjustments in the pacing of instruction
- adjustments in the presentation of Montessori lessons
- adjustments in class work plans
- scheduling and work-management tools
- the use of social skills groups

The Multi-Tiered Approach

Tier 1: Will focus on all students, ensuring catchment of those that fall into minority, low income, and English language learner categories. The goal will be to ensure academic achievement by all students at SMS. Each child at SMS will have a personal learning plan that focused on their strengths as learners. This plan will be developed by the classroom teachers as they establish goals for each student during the school year. These goals will include academic and social development. Importantly, as outlined in the preceding section (7a), the Montessori model inherently includes a wide variety of classroom adaptations including student choice, multi-age groupings, peer collaboration, and multi-sensory learning.

Special attention with the above will be given to children who fall between the 25th percentile benchmark on the screening assessments. Teachers will ensure these children are brought to the attention of the IST, so as to develop tailored academic or social support plans. In addition, these students will receive at least 90 minutes per week of targeted small group instruction in areas of need.

Tier 2: Children continually falling at or below the 25th percentile will be considered Tier II. An analysis of student related data as well as other diagnostic assessments will facilitate teachers in understanding the specific needs of these children. Specifically, the IST will meet to review the screening and other progress monitoring data collected by the teachers. A list of research-based social and academic interventions will then be developed and prioritized. As much as possible, the interventions will be done within the classroom environment. Children will receive at least 90 to 120 minutes of intensive small group instruction at least twice a week, relating to the specific academic areas of concern.

A member of the IST will conduct a weekly review of the implementation of interventions and decisions will be made regarding any necessary adjustments. Also, formal progress monitoring assessments (DIBELS) will be administered weekly, if appropriate to the child's plan. Lastly, the IST will meet monthly to review the child's progress and to problem-solve with the teacher.

Tier 3: For students who demonstrate persisting difficulties despite initial Tier 2 interventions of 12 weeks or more, the IST may move the child to Tier 3. Tier 3 involves increasing both the intensity (perhaps individual instruction) and duration (no less than 150 to 180 minutes of targeted instruction over four sessions) of the interventions used in Tier 2. If after 12 weeks of intensive instruction, a student continues to demonstrate difficulties in not meeting either academic or behavioral benchmarks, the IST will request permission from the family to administer further evaluative testing for Special Education Placement.

- c. Describe how the school will organize and use instructional support teams to engage in a problem solving process to ensure the behavioral and academic success of all students in accordance with 14 DE Admin. Code § 923.11.9.**

Throughout the response to interventions process, teachers will be supported by the Instructional Support Team. Utilizing a child study model, the IST (Education Director, Teachers

(both the child's teacher and others who are trained for this team), Special Education Teacher, Counselor, and others as appropriate) will meet to review the screening data and other progress monitoring data collected by the teacher. A variety of research-based accommodations and adaptations will then be accessed to help the teacher select and monitor those that may best support their student's needs. In addition, members of the IST will observe in the classroom and provide feedback to the teacher regarding the instructional plan's implementation. In essence the IST will provide a structure for the professional learning community; one that focuses on children's educational needs while helping teachers to succeed in meeting these learning disabilities.

The IST will also convene meetings, to ensure the behavioral and academic success of all students, for the following purposes:

- To review the child's evaluation results and determine if the child is a "child with a disability"
- If a child is found to be a "child with a disability" the IST team will convene within 30 calendar days of the completed IST evaluation to match proposed special education services with the child's identified disability; and to ensure the child's disability is being appropriately matched to such proposed services an Individualized Education Plan (IEP) will be developed. In constructing an appropriate educational program for a child with a disability, an IEP team will consider the child's involvement and participation in three main areas of school life: the general education curriculum, extracurricular activities, and nonacademic activities. From this:
 - The IEP will be developed jointly by the IST, the child's classroom teacher, and the parent(s) of the child.
 - The team will review formal and informal pieces of gathered data (e.g. state tests, homework, assessments) and determine the child's academic and functional needs.
 - The IEP will create reasonable learning goals for the child, and will identify the services SMS will provide.
 - If parents do not agree with the developed IEP and placement, a request for mediation can be made. In addition, parents may file a complaint with the Delaware Department of Education and request a due process hearing, at which time mediation must be available.
 - The IEP document will be used throughout the child's educational process to guide the delivery of related services, accommodations, modifications, and supports. (See Providing Services below)
 - The IEP will be reviewed at least one time a year, however, SMS supports that a request to have an IEP related meeting can be made at any time to review the child's progress, discuss problems, share strategies or make necessary revisions to further the child's educational program.
- Personnel to be involved with the above "eligibility" process, (other than the IST members described) will include the student's classroom teacher, the child's parents, and at least one

person qualified to conduct individual diagnostic examinations of children (i.e. school psychologist, speech-language pathologist, or remedial reading teacher).

2. Students with Disabilities

Charter schools are responsible for hiring licensed, certified, and highly qualified special educators as required by 14 Del. C. Ch. 1 and 14 DE Admin. Code § 900. School personnel must participate in the IEP Process including identifying students who may be eligible for special education services, evaluating students for special education services, developing an Individualized Education Program (IEP), and providing special education supports, services, accommodation, and modifications. Schools must comply with all applicable laws as outlined in the Compliance Certification Statement.

A. Identification

- a. Describe how the school will ensure compliance with Child Find responsibilities. Explain how the school will identify students in need of special education services and the steps required to determine eligibility for special education services and avoid misidentification.**

High standards and expectations will be set for all students attending SMS. As required by PL.94-142 and Section #504, teachers at SMS will develop, implement and update Individual Educational Plans (IEP) for students who require them. The student case manager in conjunction with the special education teachers, reading and math specialists will in accordance with the established RTI timelines, review student data (to include test scores, classroom grades, teacher observations/checklists) to ensure student success. Students who are ascertained to be falling behind or not meeting the standard will be referred to the IST (Instructional Support Team) team for intervention recommendations. Also, as part of the IEP updating process, meetings will be held and goals will be reviewed and reassessed. Students entering SMS in their Kindergarten year will be screened using the statewide universal Kindergarten screening tool as well.

- b. Describe the multi-tiers of evidenced-based academic and behavioral interventions and supports that will be provided prior to identification.**

Evidence-based academic and behavioral interventions found in typical Montessori classrooms include: the individual pacing of students' progression through curriculum; adjusting the sequence of instruction; repetition of key points; checking for comprehension; visual tools; physical prompt and cues; customizing the materials available to the child; paraphrasing; reflection time; simplified instructions and demonstrations.

The Multi-Tiered Approach

Tier 1: Will focus on all students, ensuring catchment of those that fall into minority, low income, and English language learner categories. The goal will be to ensure academic achievement by all students at SMS. Each child at SMS will have a personal learning plan that focused on their strengths as learners. This plan will be developed by the classroom teachers as they establish goals for each student during the school year. These goals will include academic and social development. Importantly, as outlined in the preceding sections, the Montessori model inherently includes a wide variety of classroom adaptations including student choice, multi-age groupings, peer collaboration, and multi-sensory learning.

Special attention with the above will be given to children who fall between the 25th percentile benchmark on the screening assessments. Teachers will ensure these children are brought to the attention of the IST, so as to develop tailored academic or social support plans. In addition, these students will receive at least 90 minutes per week of targeted small group instruction in areas of need.

Tier 2: Children continually falling at or below the 25th percentile will be considered Tier II. An analysis of student related data as well as other diagnostic assessments will facilitate teachers in understanding the specific needs of these children. Specifically, the IST will meet to review the screening and other progress monitoring data collected by the teachers. A list of research-based social and academic interventions will then be developed and prioritized. As much as possible, the interventions will be done within the classroom environment. Children will receive at least 90 to 120 minutes of intensive small group instruction at least twice a week, relating to the specific academic areas of concern.

A member of the IST will conduct a weekly review of the implementation of interventions and decisions will be made regarding any necessary adjustments. Also, formal progress monitoring assessments (DIBELS, AIMS WEB) will be administered weekly, if appropriate to the child's plan. Lastly, the IST will meet monthly to review the child's progress and to problem-solve with the teacher.

Tier 3: For students who demonstrate persisting difficulties despite initial Tier 2 interventions of 12 weeks or more, the IST may move the child to Tier 3. Tier 3 involves increasing both the intensity (perhaps individual instruction) and duration (no less than 150 to 180 minutes of targeted instruction over four sessions) of the interventions used in Tier 2. If after 12 weeks of intensive instruction, a student continues to demonstrate difficulties in not meeting either academic or behavioral benchmarks, the IST will request permission from the family to administer further evaluative testing for Special Education Placement

c. Describe the IEP team who will be determining eligibility including required roles.

The required members of the IEP team will include:

- Education Director – responsible for ensuring that the IEP plan is understood by all staff who work with the student, is knowledgeable of the general education curriculum and authority to commit available resources.
- Lead Teacher – Responsible for the implementation of the plan within the Montessori classroom.
- Special Education Teacher responsible for specific educational goals requiring specialized training and knowledge.
- Counselor as appropriate to assist with social and emotional needs.
- Parent(s) of the child to ensure that the plan is understood and to advocate for child if appropriate.
- Any individuals the parents feel have knowledge or expertise about a child.
- The team will also include at least one person qualified to conduct individual diagnostic examinations of children to interpret results of the assessments and their implications for instruction (i.e. school psychologist, speech-language pathologist, or remedial reading teacher).

All required IEP team members must attend IEP meetings unless: 1) the parent and SMS agree in writing that attendance is not needed because the member's area of curriculum or service is not being modified or discussed, or 2) the team member's area of curriculum or service is being discussed and the SMS and the parents agree in writing that the team member can submit input in writing to the parent and IEP team prior to the meeting.

B. Program Plan

- a. Describe the school's plan for ensuring compliance with state and federal statutes and regulations related to the identification, evaluation, and education of students with disabilities. Include a description of the school's specific action steps to ensure compliance with the Individuals with Disabilities Education Act (IDEA). Specify the programs, strategies, and supports you will provide for students with basic, intensive, and complex needs.**

The Montessori Model is uniquely suited to work with children with special education disabilities because its method involves individual child edification within the context of the educational program, rather than advancing a curriculum that may not be attune to particular child attributes. Thus, the Montessori model couples naturally with the concept that IDEA was not intended as a "one size fits all" approach ("Gordon, S. "Making Sense of the Inclusion Debate Under IDEA", *BYU Law Journal*, 189-225).

The special education process at Sussex Montessori School will develop through several levels of meetings. These meetings will be attended by the Head of School (or designee), Educational Director, special education teachers, other appropriate personnel or consultants to the school (i.e. nurse, counselors, school psychologist, etc.), as well as the student's parents. These individuals will comprise the Instructional Support Team (IST). If appropriate they will

recommend an evaluation of the student and a determination of their eligibility under IDEA 2004. Subsequently, for applicable students, an IEP will be developed and identified services implemented with re-evaluations effected.

SMS will ensure it adheres to statutes related to the identification, evaluation, eligibility and education of children with disabilities.

Identification - If a school professional requests that a child be formally evaluated in determination of a potential learning disability, this request will typically occur after a series of response to intervention strategies have been already implemented. (See RTI Section for additional detail). Another avenue of identifying children with potential learning disabilities will be to reference any prior “Child Find” program assessments. Finally, a request for special education evaluation may also be made by a child’s parents. This can be communicated verbally or in writing.

When a child is identified as possibly having a special education need, the child’s parents will be asked for permission to effect an evaluation. Of note, parental rights under IDEA include the right to receive prior written notice from the school each time the school proposes to take (or refuses to take) actions with respect to a child. Thus, SMS will ensure, a.) full notification of the child’s parents regarding the proposed special education evaluation, and b.) written parental consent for the evaluation. Parents whose native language is other than English will be provided with the necessary support including translators to ensure that they understand the school’s informed consent request.

Once parental consent is received SMS will complete evaluations within 45 school days or 90 calendar days, whichever is less.

Evaluation – An Instructional Support Team (IST) will conduct a full and individualized special needs evaluation. An important prerequisite of this evaluation is to ensure assessment tools are not discriminatory on a racial or cultural basis.

The purpose of the IST evaluation is to, a.) Determine if the child is a “child with a disability” as defined by IDEA; b.) Gather information that will help ascertain the child’s educational needs, and; c.) Serve as a later reference for decision-making about appropriate educational programming for the child.

The IST will utilize a variety of methodologies (e.g., observations, interviews, tests, curriculum-based assessment) and a variety of sources (parents, teachers, specialists, and at times, the child) to gather relevant developmental and academic information about the student. All areas potentially impacting on the suspected disability, including health, vision, hearing, social and emotional status, general intelligence, academic performance, communicative status, and motor abilities will be assessed as indicated.

In complying with IDEA, SMS will use technically sound processes in the evaluation of its students. Technically sound processes are defined as assessments that have been shown through research to be valid and reliable (71 Fed. Reg. at 46642). Technically sound processes require that assessments and other evaluation materials be:

- administered by trained and knowledgeable personnel;
- administered in accordance with any instructions provided by the producer of the assessments, and
- used for purposes for which the assessments or measures were proved valid and reliable.

In line with IDEA statute, once completed, parents will be provided a copy of the evaluation. If the parents disagree with the results of their child's evaluation, SMS will inform parents of their right to obtain an Independent Educational Evaluation (IEE). Further, SMS will provide information about where an IEE may be obtained.

To ensure comprehensive participation of all relevant individuals in identified children's special education, the completed IST evaluation and the actions proposed will also be provided to appropriate staff.

Eligibility – subsequent to the above evaluation process, the IST will convene a meeting for the following purposes:

- to review the child's evaluation results and determine if the child is a "child with a disability"
- if a child is found to be a "child with a disability" the IST team will convene within 30 calendar days of the completed IST evaluation to match proposed special education services with the child's identified disability; and to ensure the child's disability is being appropriately matched to such proposed services an Individualized Education Plan (IEP) will be developed:
 - In constructing an appropriate educational program for a child with a disability, an IEP team will consider the child's involvement and participation in three main areas of school life: the general education curriculum, extracurricular activities, and nonacademic activities. From this:
 - The IEP will be developed jointly by the IST, the child's classroom teacher, and the parent(s) of the child.
 - The team will review formal and informal pieces of gathered data (e.g. state tests, homework, assessments) and determine the child's academic and functional needs.
 - The IEP will create reasonable learning goals for the child, and will identify the services SMS will provide.
 - If parents do not agree with the developed IEP and placement, a request for mediation can be made. In addition, parents may file a complaint with the Delaware Department of Education and request a due process hearing, at which time mediation must be available.

- The IEP document will be used throughout the child's educational process to guide the delivery of related services, accommodations, modifications, and supports. (See Providing Services below)
- The IEP will be reviewed at least one time a year, however, SMS supports that a request to have an IEP related meeting can be made at any time to review the child's progress, discuss problems, share strategies or make necessary revisions to further the child's educational program.
- personnel to be involved with the above "eligibility" process, (other than the IST members described) will include the student's classroom teacher, the child's parents, and at least one person qualified to conduct individual diagnostic examinations of children (i.e. school psychologist, speech-language pathologist, or remedial reading teacher).

Education - In line with educating students under the IDEA, integration of the child with a disability to within the general education environment, will be undertaken to the maximum extent appropriate. This goal requires implementation of "supports, modifications, and accommodations," as well as use of "related services." The IDEA describes these principles as necessary to facilitate the education of children with disabilities. SMS understands and plans implementation of these special education principles. "Supports" relates to the assistance educators need to help them help the child (e.g. accessibility to educational conferences, having access to specialized equipment, etc.). "Modifications" relates to necessary changes made in the education or expectations of students, (e.g. making assignments less involved for special education children). "Accommodations" relates to alterations in manner of student performance (e.g. allowing a child with writing difficulties to answer questions orally). "Related services" is defined by the IDEA as "...such developmental, corrective, and other supportive services as are required to assist a child with disability to benefit from special education..." Examples include speech-language pathology, physical and occupational therapy, school health services, and social work services.

Importantly, Montessori education provides students, including those with disabilities, an individualized educational experience while focusing on doing so within an inclusive albeit broader environment. To meet this aim, the Montessori model ensures lower teacher to student ratios. Significantly, this allows many of the "supports, accommodations, and modifications" described above to take place within the generalized classroom. Furthermore, in recognizing the importance of "supports, accommodations, and modifications" in the education of children with disabilities, special education teachers versed in these principles will be available to monitor IEP implementations as well as assist teachers. More, when necessary special education teachers will provide specific instruction to help maintain "special education" within the LRE.

Of note, Montessori education employs "supports, accommodations, and modifications" in its regular curriculum. Specific examples include: co-operative learning, peer learning, hands-on education, opportunities for choice, learning centers, multi-sensory learning, physical

demonstration, as well as the use concrete materials. More, in maximizing the benefit of these education tools, a Montessori education includes repeated opportunities to practice as well as providing regular feedback. Lastly, to promote each child's individuality, regardless of disability, self-advocacy skills encouraged. In all, a Montessori education is illustrative of IDEA principles.

Specific examples of Montessori classroom education in the implementation of IEPs are:

- pacing of individual student's education
- adjusting the sequence of instruction
- repetition of key points
- checking for comprehension
- visual tools
- physical prompt and cues
- accustom the materials available to the child
- paraphrasing
- reflection time
- simplified instructions and demonstrations.

SMS plans on full compliance with current statutes regarding the Individuals with Disabilities Education Act, Section 504 of the Rehabilitation Act and the Americans with Disabilities Act.

- b. Describe how the school will provide a continuum of educational placements for students with disabilities. Include a description of the instructional strategies and supports that will be implemented to ensure placement and meaningful progress in the least restrictive environment. In addition, describe how students who require a more restrictive setting will be served within the school in accordance with 14 DE Admin. Code § 925.27.0.**

As described in the IDEA, special education involves implementation of "supports, modifications, and accommodations," as well as use of "related services." Thus based on a child's IEP, as well as their response to the tiered interventions described above, a continuum of educational placements will be utilized for students with disabilities. Relevant questions will be clarified facilitating appropriate placement. Namely, can the child be educated in a regular classroom environment; are all appropriate aids and supports being utilized while in the current LRE; have all other types of relevant accommodations within the LRE been considered and effected?

Ultimately, if the child cannot be educated in the regular classroom despite use of appropriate "supports, accommodations, and modifications," the IST placement group will consider other educational environments for the child. Importantly, SMS recognizes that relevant laws/statutes denote use of special classes, separate facilities, or the removal of children from the regular educational environment to occur only if the child's disability is such that their education cannot be achieved satisfactorily in a LRE despite the use of supplementary "supports, accommodations, or modifications."

With the above in mind, depending on the needs of the child, the IEP will be carried out primarily in a regular class with supplementary aids and services as needed using the push-in model described in earlier sections of the curriculum and instructional design items 5,6, and 7 with one to one instruction, small group instruction, accessible Montessori materials, and services from specialist within the classroom environment. The rare exception to the inclusion approach to meeting the needs of all children in a Montessori classroom would be one of the following:

- The child is highly distracted and benefits from having the first lessons with a material given in a separate environment before working with it in the classroom.
- A child with emotional outbursts who needs a quiet place to regain his or her composure before returning to work in the classroom.

In either case, the goal is to support the child so that they can learn to navigate the Montessori classroom developing self-regulation and independence.

Ultimately, if the child cannot be educated in the regular classroom despite use of appropriate “supports, accommodations, and modifications,” the IST placement group will consider other educational environments for the child. Importantly, SMS recognizes that relevant laws/statutes denote use of special classes, separate facilities, or the removal of children from the regular educational environment to occur only if the child's disability is such that their education cannot be achieved satisfactorily in a LRE despite the use of supplementary “supports, accommodations, or modifications.” With this in mind, depending on the needs of the child, the IEP will be carried out in:

- a. a regular class with supplementary aids and services as needed – This will be the primary form of services for children at SMS.
- b. a special class where every student in the class is receiving special education services for some or all of the day
- c. a special school
- d. at home
- e. a hospital or other institution
- f. another clearly defined educational setting

Also, as documented in special education regulatory statutes, SMS anticipates meeting its obligation of appropriate placement of children with special needs by either:

- providing an appropriate program for the child on its own;
- contracting with another agency to provide an appropriate program, or
- utilizing other mechanisms or arrangements that are consistent with the IDEA in providing or paying for appropriate programs for the child.

SMS's IST will provide continued direct oversight over the myriad of child placement interventions that might occur.

c. Describe how the school will ensure that students with disabilities have access and make meaningful progress in the general education curriculum and Common Core State Standards.

SMS will hold fast to the following IDEA principles: special education is a service, not a place; all students with disabilities will have access to the general education curriculum; a broad range of services will be provided, addressing the needs of all students with disabilities; IEP teams will first consider providing each student with services in the general education classroom, with supplementary aids and services appropriate to that student's needs; and a continuum of options will be provided that vary in the extent to which they provide education for a student with a disability alongside his or her non-disabled peers.

IEP goals and assessments will be aligned to the Common Core State Standards to ensure that students' academic interventions support the student in reaching the level of proficiency required by the standards. For those students with disabilities who are likely to succeed with the help of well-designed, carefully implemented and rigorously assessed general education interventions, special education services will be delivered in the general education classroom through a full inclusion model. Where services delivered in the general education classroom are not likely to result in student success, a continuum of alternative options will be provided for all students with disabilities.

At all times, SMS will comply with DE code 14 Del.C. §3110 for definitions of least restrictive environments. Educational placement options shall include, but not be limited to, the following:

- Services in the General Education Classroom 27.1.1 Inside Regular Education Class ≥ 80 percent of the day;
- Children with disabilities receiving special education and related services outside the regular classroom less than 21 percent of the day. This may include children with disabilities placed in: regular class with special education related service provided within regular classes;
- regular class with special education related services provided outside regular classes;
- or regular class with special education services provided in resource rooms.

At SMS, general education services with supplementary aids and services, when needed, will be conducted in conjunction with related services, special education teacher support services, and collaborative team teaching. As stated earlier, the Montessori classroom provides an ideal setting for inclusion and push-in services for children.

d. Describe how the school will provide multi-tiers of academic and behavioral supports for students with disabilities.

Tiers of support will be determined on an individual basis, in response to what would be the Least Restrictive Environment (LRE) ensuring academic and behavioral success. Instructional and behavioral support will be provided by qualified staff. Data will be organized in record-keeping systems (e.g., such as, I-TRACKER). This will allow teachers to keep track of students' progress through various forms of progress monitoring throughout the year. As such, SMS will hold fast to the following IDEA principles: special education is a service, not a place; all students with disabilities will have access to the general education curriculum; a broad range of services will be provided, addressing the needs of all students with disabilities; IEP teams will first consider providing each student with services in the general education classroom, with supplementary aids and services appropriate to that student's needs; and a continuum of options will be provided that vary in the extent to which they provide education for a student with a disability alongside his or her non-disabled peers.

Evidence-based academic and behavioral interventions found in typical Montessori classrooms include: the individual pacing of students' progression through curriculum; adjusting the sequence of instruction; repetition of key points; checking for comprehension; visual tools; physical prompt and cues; customizing the materials available to the child; paraphrasing; reflection time; simplified instructions and demonstrations. These are available to all children, regardless of whether they have an IEP/504.

SMS Montessori classrooms, aligned with evidence-based academic and behavioral interventions, specifically offer:

- Mixed age groups and fully differentiated instruction— A full array of materials at different levels of work is available within each multi-grade classroom. Instruction is differentiated for all students, making the differentiation for those with ELL and special education needs an easily incorporated and natural part of the classroom (Katz, 1992).
- Individual and small group lessons—The entire Montessori classroom is set-up around one-on-one and Small group work. When an interventionist comes in and offers such lessons, it fits well within the norm of the classroom and in no way disrupts or stands out from the usual flow of the classroom (Tilly, 2008).
- Uninterrupted 3-hour work period— Montessori classrooms are structured around an extended uninterrupted work period during which students move freely between work areas and materials. This structure allows the interventionist to work with students at a mutually agreeable time, minimizing interruptions, supporting student choice and thereby enhancing learning (Lillard, 2007).
- Materials that move from the concrete to abstract— Montessori materials begin with concrete representations and then move to abstract for all students. These same materials are easily accessible to ELL and special education students and can be used by push-in teachers to reinforce regular lessons.
- Montessori teachers are continually adapting the classroom environment in efforts to meet the educational needs of students. Adaptation tools to assist with writing, ear muffs to assist children in focusing, and ensuring quiet private work areas are among the many

interventions that Montessori teachers can implement in order to support individualized learning. In addition, interventions may include but not be limited to:

These interventions will be monitored for effectiveness. If they are not having the desired results, the teacher and student along with special education faculty, will look to implement additional supports. These could include increased frequency of modifications, scaffolding, additional modeling, etc. Related services may be consulted as well to determine if additional language supports or occupational therapy supports would be helpful. These could include visual cues, weighted blankets, increased physical activity, etc.

e. Explain how the school will ensure parent participation in the IEP process in accordance with 14 DE Admin. Code § 900.925.22.

SMS will take steps to ensure that one or both of the parents of a child with a disability are present at each IEP Team meeting or are afforded the opportunity to participate. Parents will be notified of the IEP meeting no less than ten (10) school days prior to the IEP meeting, and the meetings will be scheduled at a mutually agreed upon time and place. The notice sent to parents and the student about the meeting will include the purpose, time, and location of the meeting and who will be in attendance from the school or other agencies. Parents will be invited to extend the meeting invitation to other individuals who have knowledge or special expertise about the child. When appropriate, the meeting invitation will also indicate that a purpose of the meeting will include the consideration of the post-secondary goals and transition services for the child.

If the parent is not able to attend the IEP meeting, then the Special Ed. Teacher will talk with the parent via phone calls or conference telephone/web based calls. In the event that the parent(s) refuse to attend the IEP meeting, the Special Ed. Teacher will keep a record of the attempts to arrange a mutually agreed on time and place. The Special Ed. Teacher will arrange for an interpreter for parents with deafness or whose native language is other than English. At the IEP meeting and whenever requested, the Spec. Ed. Teacher will give the parent a copy of the child's IEP at no cost to the parent.

f. Describe how the school will ensure that IEP accommodations are provided for students with disabilities on the Delaware System of Student Assessment (DeSSA) and on the Alternate Assessment.

All IEPs will include any accommodations required for a student to participate in DeSSA and Alternate Assessment as necessary. The IST team and the Education Director will be responsible for the implementation of the accommodations as required. Specific accommodations may include but are not limited to:

- Extended time to complete the assessment
- Testing in a separate area
- Small group testing
- Individual testing

- Use of Braille or oral reading for sight impaired children
- Use of calculators
- Print size enlarged
- Text to speech support

g. Describe how the school will ensure that IEP services, supports, and accommodations are implemented by all staff working with students with disabilities

The IEP team will be responsible for a minimum of quarterly reviews of individual students' IEPs and the students' progress toward goals. The Education Director will be responsible for communicating to all staff who work with the student including related arts teachers, assistant teachers, and others as relevant about particular accommodations that may relate to their areas of focus with the student. All such communications shall be viewed as confidential and for instructional and behavioral supports only as outlined in the IEP. SMS will also provide training and support for teachers to meet the needs of individual students with disabilities within the Montessori Classroom setting. This includes such topics as:

- Understanding brain-based research related to various topics, specifically children's educational development
- Monitoring responses to interventions, specific interventions and or adaptations
- Specialized focus on models such as the All Kinds of Minds training and Responsive Classroom Training
- Understanding the regulatory aspects of the Individuals with Disabilities Education Act, Section 504 of the Rehabilitation Act, and the Americans with Disabilities Act

Accommodations and interventions will also be monitored when teachers are observed during classroom walk-throughs and formal observations.

h. For students with disabilities who are age 14 or older, or who are entering the eighth or a higher grade, explain how the school will address transition planning/provision of transition services.

Not applicable

C. Monitoring and Accountability

- a. Describe how the school will regularly evaluate and monitor the progress and success of students with disabilities to ensure the attainment of each student's goals set forth in the IEP and to ensure mastery of the Common Core Standards. Include a description of how the school will address students not making progress on IEP goals or toward mastery**

High standards and expectations will be set for all students attending SMS. As required by PL.94-142 and Section #504, teachers at SMS will develop, implement and update Individual Educational Plans (IEP) for students who require them. The student case manager in conjunction with the school counselor, teachers, reading and math specialists will periodically (at least monthly) review student data (to include test scores, classroom grades, teacher

observations/checklists) to ensure student success. Students who are ascertained to be falling behind or not meeting the standard will be referred to the IST (Instructional Strategies Team) team for improvement recommendations. Also, as part of the IEP updating process, meetings will be held and goals will be reviewed and reassessed.

b. Describe how the school will ensure that required participants, including parents, will attend IEP meetings.

Meetings will be scheduled in advance and reminder calls, emails and letters will be sent. Substitute coverage may be needed so that teachers can attend meetings. Although not ideal, IEP meetings may be conducted via telephone or internet if parents are unable to meet in person. Two or more staff members would then have to follow up with the parent and ensure that all necessary signatures are received. This may also require a home visit.

c. Describe the strategies that will be used when parents do not respond to school staff attempting to schedule IEP meetings, or when parents cannot or do not attend IEP meetings

All measures will be exhausted to ensure parental involvement at IEP meetings, as the law requires parent permission to test, report results and offer services. SMS staff will communicate to parents the importance of their role as a member of the IEP team. Public transportation passes may be supplied, two or more staff may provide transportation for parents, notes will be supplied to employers for days missed at work, or home visits may even be necessary to obtain parent support and participation. SMS will also offer video and phone conferencing for parents who are physically unable to attend IEP meetings.

d. Describe how the school will ensure participation of general education in the IEP meeting. For students who turn 14 or enter the 8th grade during the IEP year and who are participating in a career and technical education program, describe how the school will ensure that a CTE teacher/career technical teacher coordinator attends the IEP meeting.

SMS is an elementary program, therefore, transition plans/services (for 14 year olds/students entering 8th grade) are not required. The general education teacher will be part of the IST and will then continue to serve on the IEP team. Due to SMS's commitment to inclusion, general education teachers will be an integral part of the IEP team/meetings.

e. Describe the school's system of accountability to ensure compliance with IDEA, provision of special education services and procedural safeguards, along with a process to monitor student records and staff practices for regulatory compliance across the school.

The Individuals with Disabilities Education Act (IDEA) is a law ensuring services to children with disabilities throughout the nation. To ensure compliance, teachers will complete “Student Accommodation and Supplementary Aid Logs” / Accommodations Trackers (see attached) for each student with disabilities. This will help them document when students are offered accommodations and when those accommodations are used or refused. These trackers will also provide useful information for the IEP/504 team when determining which accommodations are needed for individual students.

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D. Staffing and Professional Development

- a. **Describe how the school will employ qualified special education staff, including, but not limited to, certified and highly-qualified special education teachers, and related service providers (including but not limited to Occupational Therapist, Physical Therapist, Speech/Language Pathologist, and School Psychologist). Include a list of the staff positions and a description of the duties for each position.**

Sussex Montessori School will employ a minimum of one certified, highly qualified special educator who will work with classroom teachers to write, revise and implement IEPs and 504 plans. In addition, the Education Director will be recruited with a strong preference for a special education certification and experience. All teaching positions will be advertised with a preference in dual certification as well. Related services (OT, PT, Speech) will be provided through contracts with certified and experienced providers. A School Psychologist will also be contracted as needed for evaluations, IEP meetings, etc.

Staff Position	Description of Duties
Special Education Teacher	Write, revise and Implement IEP and 504 plans in collaboration with classroom

	teachers and assistants. Provide direct service for children needing alternative settings; attend IST as necessary
Education Director	Provide leadership and support in all academic areas; ensure IEP and 504 plans are being implemented with fidelity; attend IEP and 504 meetings; oversee RTI process; ensure professional development for all instructional faculty and staff; attend IST as necessary
Speech Pathologist	Conduct evaluations as needed; Write IEP for children needing speech and language interventions, provide direct service; attend IEP meetings as necessary; attend IST as necessary
PT/OT	Conduct evaluations as needed; Write IEP for children needing PT/OT interventions, provide direct service; attend IEP meetings as necessary; attend IST as necessary
School Psychologist	Conduct formal assessments for children identified through the RTI process or who come to SMS needing a reevaluation; Consult on IEP writing; Attend IEP meetings to discuss testing results and provide input into plans; attend IST as necessary

- b. Describe how the school will ensure that all staff (including but not limited to administrators, special education teachers, regular education teachers, guidance counselors, and support staff) are adequately trained and properly implementing state and federal law related to the identification, evaluation, and education of students with disabilities.**

In order to meet the individualized needs of its students with disabilities, SMS will ensure continual special education training of its teachers. This reflects both traditional Montessori practice, as well as meeting state and federal regulations.

Training of teachers and staff will involve instruction across various content areas, including:

- understanding brain-based research related to various topics, specifically children’s educational development,
- monitoring responses to interventions, specific interventions and/or adaptations
- specialized focus on models such as the *All Kinds of Minds* training and *Responsive Classroom Training*.

- understanding the regulatory aspects of the Individuals with Disabilities Education Act, Section 504 of the Rehabilitation Act, and the Americans with Disabilities Act.

SMS recognizes the responsibility of Charter schools to monitor their special education programs. SMS will serve as its Local Educational Agency (LEA), which will then be monitored by the Department of Education. Relevant quantifiable and qualitative indicators to be used in monitoring will include (Delaware General Assembly: Delaware Regulations: Administrative Code: Title 14 Education, 900 Special Populations):

- the provision of FAPE in the LRE
- the use of resolution meetings, mediation, and transition services
- assessing any disproportionate representation of racial and ethnic groups in special education and related services, to the extent the representation is the result of inappropriate identification

SMS plans accountability within its special education programs. In serving as its LEA, the accountability process will start with a self-assessment to reviews its implementation of every special education requirement. Program data and outcomes will be reviewed. In addition SMS will document:

- specific outcomes of students with disabilities,
- fiscal practices related to special education,
- timelines related to development and implementation of special education services
- qualifications of faculty and staff
- resolution of parent complaints.

Importantly, SMS recognizes that resources are available to charter schools to assist them in being successful in special education monitoring. SMS anticipates utilization of these resources in order to ensure a strong and accountable special educations program. Examples of available resources include:

- State Educational Agency, (SEA)
- other LEAs
- regional resource centers
- other charter schools
- National organizations.

Another strategy to be explored in assisting SMS with its special education programs monitoring and accountability is the use of “monitoring mentors.” These experienced special education personnel, with specific expertise in charter school special education programming will be instructional in the day to day operations of the special education programs. Finally, in the event, that through the above monitoring and accountability reviews SMS is found to have any special programs deficiencies, remediation will occur no later than one year after the reported deficiency (in accordance with state DOE regulations).

3. English Language Learners

Charter schools are responsible for the identification of English language learners, the provision of English language services, and the annual assessment of English language proficiency as required by 14 DE Admin. Code 920. Additionally, charter schools are responsible for hiring certified English as a Second Language (ESL) and/or bilingual educators to provide services to English language learners. Paraprofessionals and tutors may serve English language learners only under the supervision of a certified ESL or bilingual teacher. In addition, ESL/bilingual school personnel must participate in the IEP Process of students who are dually identified for both Special Education and English language learners (SWD/ELL).

There is evidence that Montessori Classrooms positively impact the academic learning of ELL students. Researchers Arya Ansari (UT-Austin) and Adam Winsler (George Mason) explored how Montessori pre-K programs affected the school readiness of African-American and Latino children. The researchers measured student progress on pre-academic skills as well as social-emotional and behavioral metrics. In this study, Latino students were, on average, the least prepared on school readiness metrics when they began pre-K. Yet they responded particularly strongly to Montessori programs—by the end of the year, their school readiness scores were above national averages. The researchers speculated that the results could reflect the language backgrounds involved. The Montessori curriculum focuses heavily on phonics, which may help Latino students whose families speak Spanish at home. What’s more, Montessori programs emphasize student-driven, individualized instruction, which may best suit these students’ unique developmental paths. Finally, Montessori’s commitment to cultural openness may make these programs more naturally prepared to take an assets-based view of students’ home languages and cultural backgrounds.

In addition, the East Dallas Community Schools cited above in the research section, serve a number of children classified as ELL. Many have very limited English skills when they begin in the school. At the end of third grade, 100% of the children are fluent in English.

- a. Explain how the school will identify English language learner students in need of English language services, including the steps required to screen and assess the English language proficiency level and the timeline for completion.**

Because Sussex Montessori School is proposing to locate in Western Sussex County, we expect to serve a significant number of students who will be English Language Learners. We will follow the guidelines as outlined by the state of Delaware in the Delaware Department of Education Title III/ESL Guidebook. Specifically, we will identify students using the DDOE Home Language Survey for all students registering for the school. This survey will be included in the registration packet. Parents will provide the language information and sign and date the form. A translator will be enlisted if needed. The Head of School or Education Director will work closely with the parents to be sure that they understand the questions and respond accurately for each child. If

responses indicate that the use of a language other than English is used by any person in the home, SMS will conduct further assessment to determine the student's proficiency level and make instructional decisions. A review of the information provided by the family and the assessment will be completed within the 10-day window required by the state. The HLS will remain in the student's cumulative files.

SMS will require the Head of School, Education Director, and at least one lead teacher to be qualified to administer the World Class Instructional Design and Assessment (WIDA). This assessment will be administered in the first 10 days of a student's enrollment. The WIDA-Access Placement Test will be used for children in grades 2-6 while the WIDA Measure of Developing English will be used for grades K and 1. SMS will follow the guidelines for administration as outlined in the DDOE Title III/ESL Guidebook page 28 – 30.

In addition to the DDOE Home Language Survey, the school will use the Student with Interrupted Formal Education (SIFE) to screen the child's educational history. This will be done during the first 30 days of a student's enrollment if the student is an immigrant student, a migrant student, a binational student, a foreign exchange student, or a refugee student as defined in the DDOE Title III/ESL Guidebook.

b. Explain how the school will schedule the contact hours for instruction based upon the English language learner's proficiency level.

Since Sussex Montessori School expects to serve ELL students from the community around the school, we will strive to hire state certified ELL teachers who will do their Montessori Training. This will allow the teacher to serve the students within the Montessori classroom setting. This would be the least intrusive model for supporting ELL students. However, if there should be ELL students in the school and the school leadership is unable to fill all classroom positions with ELL teachers, the school will be prepared to hire a sufficient number of ELL teachers to serve the children within the classroom in an inclusion model.

c. Describe the program model(s) the school will use to deliver the English language services to students.

As stated above, SMS will use an inclusion/co-teaching/push in model for supporting ELL students in the Montessori classroom. This model will primarily instruct students in English but we will seek teachers who are bilingual and able to support the child in their native language when needed. The multi-age environment is uniquely situated to support ELL students. Children are constantly working in small groups, using oral language skills, and collaboratively using the Montessori hands on materials. This language rich environment provides a natural support and structure for the ELL student. In addition, there is a wide variety of materials at various levels in the classroom. It is very easy for an ELL teacher to support the child to use the materials within the classroom environment. The Montessori materials are actually universal and not dependent on any one language. They are used across six continents and many

languages. In order for this model to work well for the child, the school will need to ensure that there is sufficient time for the teachers to work together to plan to meet the needs of the ELL students within the context of the classroom.

d. Describe the minimum English proficiency level scores required for enrollment into the ESL/bilingual program and the minimum exit level criteria to transition out of the program.

Students at WIDA levels Entering, Beginning and Developing will be enrolled in the ESL program with parent consent. These students will typically be in Tier A for services. Students in the Developing Level and Expanding Level will be moving to Tier B. Students at the Expanding or Bridging levels who are socially adept and require some support for academics will be transition out of the program once they are able to be academically successful. All guidelines for Exit Criteria as outlined in the DDOE Title III/ESL Handbook will be followed (pg. 55).

e. Describe the school's plan for addressing parent involvement for English language learners, including immigrant students.

Parents will be notified when their child is classified as an ELL student and informed of the services being provided to support the child. Parents have the right to refuse services. All notifications as required by the DDOE Title III handbook will be followed (pages 45 and 46) A copy of these annual notifications will be kept in the student's cumulative record. In addition, parents will be welcomed as an active part of the school community. Montessori classrooms are distinctly focused on understanding the global community, the basic needs of man that cross all cultures and respect of the similarities and differences across cultures. Parents are a vital part of sharing about their own background and experiences in the Montessori community.

f. Describe how the school will ensure that English language learner students receive instruction and support to access and make meaningful progress in the general education curriculum and Common Core State Standards.

ELL students increase English proficiency when given multiple opportunities for speaking and listening during peer interactions. The Montessori educational model is designed to allow for peer interaction throughout the day. For example:

- Morning Meeting addresses the social language needs of students including peer models, lots of peer interaction with models of appropriate social language (i.e. sentence stems). This is also a time when the ELL child can share their own language with other children in the classroom.
- Montessori uses the multi-age classroom and peer teaching. Montessori children are taught how to give help and how to receive help from peers. ELL students in the

Montessori classroom benefit from working with or alongside peers with greater English proficiency.

- Montessori content is delivered by teachers to children in small groups or in individual lessons based on the learning needs of the child. ELL children are not frustrated with large group instruction that they cannot participate in.

As shared above, the Montessori materials are hands on and universal across many cultures and countries. However, there is a language rich component to the Montessori language materials which help ELL children to develop strong English Language skills. For example,

- Montessori language work includes a wealth of picture supports that the ELL teacher can use to assist ELL children to acquire new vocabulary.
- Children sort and name objects increasing their verbal and reading vocabulary.
- Montessori materials for math and language help ELL students learn with concrete models of abstract concepts. The materials are consistent across all grade levels helping children to internalize concepts and vocabulary.
- Grammar manipulatives are especially helpful to ELLs by providing a visual representation to the parts of speech and their combinations to form English grammatical structures.

These are just a few of the many ways that ELL children participate in the curriculum regardless of their language proficiency in a Montessori Classroom.

- g. Describe how the school will ensure that all English language learners, including those dually identified as students with disabilities who are also English language learners, will be assessed annually for English language proficiency.**

All students will be assessed annually with the Access for ELL assessment schedule as outlined on page 54 of the Title III/ELL handbook. This assessment will be used to determine the level of ELL support needed for the child regardless of any other identified disabilities. Accommodations in taking the assessment will be made as appropriate to the disability.

- h. Describe how the school will ensure that English language learners, including those dually identified as students with disabilities who are also English language learners, will be provided services for both programs.**

Sussex Montessori School will have a team approach to serving all children but most importantly those children who have dual identifications in ELL and another disability. A special education teacher will provide guidance and support to the child for the disability while the ELL teacher will work to ensure that the child's ability to use English improves over time. These teachers will work closely with the Montessori classroom teacher (they may even be the classroom teacher) to ensure that the child's needs are supported. Biweekly meetings will be

held to discuss the child's progress reflecting on observation data and formative assessments to set goals for the next few weeks.

4. Gifted Students

Explain how the school will identify and meet the needs of gifted students, including:

- a. The specific research-based instructional programs, practices, strategies, and opportunities the school will employ or provide to enhance their abilities;**
- b. How the school will provide qualified staffing for gifted students; and**
- c. How the school will assess and monitor the progress and success of gifted students.**

SMS will not be creating a separate program for gifted children but will meet their needs in the least restrictive environment, the Montessori classroom. Gifted students are generally identified as children who show exceptional levels of performance in one of the following: general intelligence, specific academic aptitude, creative thinking, leadership, and visual or performing arts.

Gifted students will be accommodated within the multi-age Montessori classroom with learning activities that are engaging, allow the child to explore concepts in depth, and provide for various ways to approach the task. In this way, the classroom provides a balance among academic, social and emotional learning and critical and creative problem solving. General consensus is that the gifted child benefits in classrooms where:

- Teachers are enthusiastic and knowledgeable
- Curriculum is flexible
- Students can work in areas emphasizing their abilities rather than age/grade for placement
- Where hands-on learning is emphasized instead of rote memorization
- Parent participation is encouraged

Each of these is typical of a Montessori classroom. The prepared environment encourages gifted children to be self-directed and to move to the next step when they are ready. There is opportunity for students to follow their own interest. In other words, if a student is totally engrossed in writing a play based on a story she read, she can keep writing until it's done or take a break and work on something else for a while. These extended periods of time give students the opportunity to study a topic in depth or to make great jumps in progress through intensive and prolonged involvement.

As shared above, Montessori classrooms are ideally suited to the development of individual goals for learning. Teachers work closely with parents and children to identify strengths and challenges and strategies children will use to work on those challenges and grow their strengths. This approach supports the gifted child's desire to set goals within areas of personal interest to explore and work on. In addition, the social and emotional needs of a gifted child are supported in the Montessori classroom where children are accepted for who they are and

the gifts they bring to the classroom. Students learn to appreciate the unique gifts of all children participating in the classroom community.

The Montessori classroom environment's ability to support a gifted child could preclude the necessity of a specific identification of the child as gifted. However, if it is felt that further information about the child would benefit their educational development and plan, SMS will collect both quantitative and qualitative data including individual tests, interviews and questionnaires, work samples, evidence from students and peers, and pertinent information on factors that could impact the opportunity of a child to fully engage in the curriculum such as economic, linguistic, or cultural background.

SMS expects that teachers will need support to understand the unique attributes of gifted children and how best to support them in the Montessori classroom. Resources and professional development opportunities will be provided to teachers to assist them in understanding how to support the gifted child's unique needs in the Montessori classroom.

SMS will access the [DDOE Gifted or Talented Education Program Resource Guide](#) to evaluate its program to support gifted education.

5. Homeless Students

Explain how the school will identify and meet the needs of homeless students. Describe the training that the staff members will receive to meet the needs of homeless students.

SMS will provide education for its staff members in the identification of and services for children who are homeless. In particular, we will access the National Center for Homeless Education web site for training resources and webinars.

We will use the definition of homeless as described in Title 14 – 901 Education of Homeless Children which includes children and youths who are sharing the housing of other persons due to loss of housing, economic hardship or similar reason; are living in motels, hotels, trailer parks, or camping grounds due to lack of alternative accommodations; are living in emergency or transitional shelters; or are awaiting foster care, are living in a private or public place not typically designed for human beings such as cars, parks, public spaces, abandoned buildings, etc.

The first step in identification will typically come at registration. The school office personnel will be trained to support parents in the completion of a residency questionnaire at this time. If a child is already enrolled in the school, the teacher or other staff may be the first to notice changes that may indicate that a child is homeless. When it is determined that a child is in fact homeless, the school will enlist the assistance of the appropriate authorities to assist that family.

SMS will adhere to the requirements of the McKinney-Vento Act including the following:

- Understanding that homeless children have a right to stay in their school of origin, we will work with families to determine the best ways to transport the child to SMS. If the family desires, we will facilitate the transfer of records to the school in which they are temporarily residing.
- Enroll a homeless child in school regardless of ability to produce required records.
- Work with community services and programs to acquire services for the family.
- If SMS finds that there are a large number of homeless students enrolled in the school, we will determine a local homeless education liaison to work with these families.

We will support the educational needs of the child by:

- Providing a safe and consistent Montessori School and classroom environment to support both the academic and social/emotional needs of the child,
- Ensuring that the child has needed school supplies,
- Accommodating issues such as tardiness, absenteeism, and other behaviors by providing supports to address the issues.,
- Linking the family and child to community services to support them,
- Provide free meals,
- And maintaining confidentiality.

Reference:

National Center for Homeless Education, “Serving Homeless Children and Youth in Charter Schools”. Retrieved from: www.serve.org/nche

Student Recruitment and Enrollment [14 Del. C. § 512(6) and (8) and 14 DE Admin. Code 275.4.4.2]

1. **Describe your plan to recruit students in your pre-opening year, including the strategies, activities, events, responsible parties and benchmarks and timelines that will demonstrate suitable progress over time. (Note! Be sure to reference [https://www.schoolchoicede.org/.](https://www.schoolchoicede.org/))**

Sussex Montessori School intends to become a cornerstone organization in the community it resides. This will require knowledge of and commitment to the current families living and working in the community and recognition of the needs and wants of the community as it grows.

To fully execute a successful recruitment plan SMS will consider the current and projected demographics of the potential student body and the importance of community commitment/engagement. The composition of the board of directors includes residents of the community we intend to serve and the board will continue to recruit the support of more local parents and community leaders to actively engage in the recruitment efforts once the application is approved.

Sussex Montessori School has already begun the community engagement efforts as required in the application. Advertisement and media coverage of our efforts have already shown increased energy and excitement in the community. Through both social and print media additional parents, community leaders and career educators have become engaged in the cause. Please see **Attachment 7 for parent interest forms.**

A case statement (Attachment 7a) has been prepared in both English and Spanish and is being widely distributed throughout Sussex County. These efforts will continue and increase once the application is approved.

Based on what we know about the proposed community, and what we propose in the educational plan, the board and ultimately the Head of School will focus on the following in the first year:

Strategies	Timeline	Events/Activities	Benchmark	Responsible Party
Social Media/Web Engagement	January 2017 - ongoing	Montessori Works Facebook and Twitter posts about Montessori education	Monthly posts	Montessori Works Board Member
	October 2017	Creation of a Citizens for Sussex Montessori Facebook page that would be renamed Sussex Montessori School upon application approval	Weekly Posts	Currently MW board, transitioning to SMS board and then ultimately to Head of School or their delegate
	October 2017 - ongoing	Grow the number of followers on the Citizens for Sussex Montessori Page	Current = 91 Followers June 2018 = 150 followers June 2019 = 300 followers	Currently MW board member, transitioning to SMS board member and then ultimately to the Head of School or their delegate

	April 2018 - January 2019	Widely advertise the open enrollment period for the school choice application available at www.schoolchoicede.org	January 2019 = 200 applicants on www.schoolchoicede.org	SMS Board transitioning to Head of School or their delegate
	May 2018 - June 2018	Creation of a Sussex Montessori School Website	Hire a consultant to design and launch a website - May 2018 Launch website including information about the school in addition to links to www.schoolchoicede.org including the Choice timelines and enrollment process	SMS Board Chair
In-Person Parental Engagement	April 2018 - August 2019	Montessori Information coffees for parents/children	One per month	SMS Board transitioning to HOS to engage presenters
	October 2017 - January 2019	Visits to local preschools	100% of preschools provided with information about Montessori education and Sussex Montessori School 2x within the timeline	SMS Board and HOS
	July 2018 and July 2019	Montessori "classroom" at the Delaware State Fair	Interest forms completed during visits to the "classroom"	SMS Board and HOS
	September 2017, 2018 and 2019	Festival Hispano Georgetown	50 interest forms each year	SMS Board and HOS
	October 2018 - March 2019	Sussex Montessori School Open Houses	25+ attendees at each month's open house	HOS
	May 2018 - March 2019	Partner organization events	25 attendees at each event	SMS Board and HOS
Print media	October 2017 - September 2019	Media coverage in local newspapers (Cape Gazette, Sussex Post, Hoy en Delaware, etc.)	Articles on SMS efforts or letters to the editor bi-monthly	SMS Board and HOS
	October 2017 -	Wide distribution of case statement in both English and Spanish	Monthly meetings with partner organizations,	SMS Board and HOS

	September 2019		potential board members, funders, etc.	
	October 2017 - September 2019	Advertisements in local newspapers and at local community organizations	Bi-monthly advertisements in local newspapers and flyers in community meeting spaces/organizations	SMS Board and HOS
	October 2018	Direct Mailing targeted to families with children in the target community - invitation to open house and announcement of online choice application	500 direct mail announcements	SMS Board

The SMS Board and, once hired, the SMS school leader will be monitoring enrollment targets throughout the course of the planning year. In addition to the benchmarks included in the chart above, the following benchmarks will be used as an assessment of efforts and as an indicator of their effectiveness. If particular targets are not met the SMS Board and HOS will make adjustments to the strategies/events/activities as needed.

April 2018 - Charter Approval and 330 interest forms

July 2018 - 400 interest forms

September 2018 - Hiring of Head of School

November 2018 - 50 choice applications

December 2018 - 100 total choice applications

January 2019 - 200 total choice applications

March 2019 - 300 applications

2. **Explain the plan for student recruitment and marketing that will provide equal access to any family interested in the new school. Specifically describe the plan for outreach to families in poverty; academically low-achieving students; students with disabilities; linguistically diverse families and other youth at risk of academic failure. The response should include the following:**
 - a. **A brief description of the recruitment strategies that the school will employ to attract each of the students described above to the school; and**

Throughout the application process SMS has researched the current and projected demographics in an effort to best understand the students and families who will populate the school. It is expected that SMS will enroll students who are living in poverty, academically low achieving, students with disabilities, linguistically diverse families and other youth at risk. The following statistics help to frame the demographics of the community SMS will serve.

General Population Statistics

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.

Considering these statistics and it is imperative that our efforts to date and those that will be launched immediately upon application approval be sensitive to the unique needs of the

children and families in Sussex County. We will be comprehensive in our approach to ALL parents, including those in underserved neighborhoods and towns.

To ensure that we are recruiting and enrolling students from diverse backgrounds we will partner with community organizations where families are already present to receive social service supports, engage their children in preschool or after school care, etc. Some of our established community partners include the Summer Collaborative, First State Community Action and La Esperanza. An aggressive campaign of distributing literature through mailings, handouts, and door to door campaigns will be accomplished in diverse communities and with interpreters and translated documents whenever necessary.

We will use Spanish-language materials and a Spanish-speaking teacher to attend the public events to ensure that we can meet the informational needs of the potential parents. Among the materials to be used to recruit are brochures, cards, mailers, video, radio and television. PowerPoint and video displays will be used on a rotating basis. We will also have a sample classroom established for children to come and explore materials that we use in the classrooms. All events will be done in disability accessible environments.

When holding community events for parents and students to familiarize themselves with the application of Montessori materials and approaches we will make an effort to insure these events will take place in public arenas, such as libraries, community centers (e.g. PAL centers, Boys and Girls Clubs, etc.)

- b. A brief explanation of the efforts, resources, structures, or programs that the school will take to retain these students and how the school will monitor the efficacy of such efforts, including disaggregation of student performance data for each subgroup. Identify your target re-enrollment rate for each year.**

It is expected that parents and children will continue to support the school so long as SMS provides them with a high quality, academically challenging, safe and positive environment. Recruitment and enrollment will be easier once a record of success is achieved. Once opened, the program, if done well, will yield word-of-mouth interest from parents. Returning and newer children will benefit from a well- executed and coordinated program.

Nonetheless, SMS intends to aggressively market the school each year. We will participate in the choice period events (Charter School Network Open House), perform community events in the school, encourage siblings and other family members to apply and work with day care and pre-school providers to encourage enrollment. Strategies identified for the first year's recruitment efforts as effective will be repeated each year to retain a stable student body.

Consistent communication throughout the school year and regular engagement of families in the school culture traditionally keeps families satisfied with their child's school. These efforts

are worked into our calendar and strategies and the Montessori school environment is historically designed to create a strong community.

Academic performance is monitored closely in a Montessori setting and communication of each child's progress with the child and with their family is a consistent feature in every Montessori classroom. In addition, the teachers, Education Director and Head of School will monitor in both the aggregate and disaggregate forms, all student assessment data annually. Some assessment data will be monitored quarterly when available. As a whole, the faculty and leadership will identify trends and implement interventions to address them.

Target re-enrollment each year is 95%.

- 3. In Attachment 7 (Parent Support Survey), provide evidence of demand for the proposed school among prospective parents/guardians. (Note! The Department is looking for evidence that your proposed school is wanted by the local community, and that enough pupils would come to your school to make it financially viable. This evidence takes the form of a survey that parents sign expressing support for the school. Specifically, you should aim to show that you have support from parents for at least as many pupils as the number of seats in your school in its first two years of opening. This is a minimum and your application will be rated more strongly if the school is significantly oversubscribed.)**

See attachment 7 - spreadsheet indicating all interest forms received to date

Original documentation of each interest form has been submitted to the DDOE Charter Schools Office. These interest forms contain personal directory information and are therefore not included here to ensure privacy.

- 4. Describe the ongoing student recruitment work that you will do once your school has opened. Identify the ways in which it will be different than your pre-opening year in terms of the strategies, activities, events, persons responsible and benchmarks.**

Many of the year one activities will continue in the early years of the school. Some may be able to be tapered back in terms of frequency for example Open Houses and print media advertisements may not be needed as often once there is a parent base that is recruiting within their communities.

The biggest change once the school has been opened is the persons responsible section. In the planning year the SMS Board and the Head of School bear the vast majority of responsibility. Once an Education Director, teachers and other school staff have been brought on board the responsibilities can be more broadly distributed. In addition, as partnerships grow SMS will seek to structure partner support in the recruitment and enrollment process.

5. **Provide, as Attachment 8, the school’s Enrollment Policy and Withdrawal Policy, which must include the following:**
 - a. **Any admission requirements, including an explanation of the purpose of any pre-admission activities for students or parents;**
 - b. **Any admission preferences in accordance with 14 Del. C. § 506(b) and how they will be used, including how the school will identify Founding Group members and how the preference to children of the school’s Founding Group members will be used, if applicable;**
 - c. **Establish a timeline for its application and admissions processes identical to any such timeline set forth in 14 Del. C. Ch. 4 for the operation of a public school choice program. Provide an approximate date for the lottery and describe the procedures for conducting a fair lottery process;**
 - d. **Policies and procedures for student waiting lists, withdrawals, re-enrollment, and transfers.**
 - e. **A timeline and plan for student recruitment and enrollment;**
 - f. **Plans to maintain on file a written statement, signed by the parent or guardian of each enrolled child, that acknowledges that the child will attend the charter school for at least one complete school year pursuant to 14 Del. C. § 506(c)(3).**

See Attachment 8

School Culture [14 Del. C. § 512(6)-(7) and 14 Del. C. §4112D]

1. **Describe the culture or ethos of the proposed school and how this culture or ethos will promote a positive academic environment and reinforce student intellectual and social development.**

Sussex Montessori School will use the Responsive Classroom Approach to develop a consistent and coherent positive school environment across the school community. This approach is based on seven guiding principles:

- The social and emotional curriculum is as important as the academic curriculum.
- How children learn is as important as what they learn.
- Great cognitive growth occurs through social interaction.
- To be successful academically and socially, children need to learn a set of social and emotional skills: cooperation, assertiveness, responsibility, empathy, and self-control.
- Knowing the children we teach—individually, culturally, and developmentally—is as important as knowing the content we teach.
- Knowing the families of the children we teach is as important as knowing the children we teach.
- How we, the adults at school, work together is as important as our individual competence: Lasting change begins with the adult community.

This research based approach has been shown to positively impact student achievement, improve teacher-student interactions, and increase the amount of time children are engaged in the classroom. The Responsive Classroom approach provides a framework for the social climate of the Montessori classroom and school. The Responsive Classroom C.A.R.E.S. (Cooperation, Assertion, Responsibility, Empathy and Self Control) will guide interactions across the school community fostering a positive and healthy learning environment based on:

- Respect and appreciation for what each member contributes to the community.
- Mutual respect and trust in communications, no matter what our roles may be.
- Teamwork and support of each other in our personnel growth.

Specifically, the Responsive Classroom C.A.R.E.S. statement will encourage the adults and children in the school community to teach and develop the following skills:

Cooperation

1. Listening respectfully and actively to all perspectives
2. Collaborating to share resources, information, and ideas
3. Participating positively and actively in the process to support a positive outcome
4. Compromising to achieve a common goal

Assertion

1. Setting healthy boundaries and expressing needs honestly, directly and respectfully
2. Considering appropriate time, place and participants when addressing concerns
3. Behaving in a manner that is mutually safe and respectful
4. Stating ideas clearly using a calm voice and respectful tone
5. Staying on topic and focusing on solutions

Responsibility

1. Keeping our commitments to each other and the community
2. Acting as positive role models for others in the school community
3. Approaching challenges from a solution-oriented perspective
4. Inviting and including all parties who need to be part of, and could be affected by, our conversations and decisions.

Empathy

1. Being responsive to the needs of others, supporting, encouraging, or assisting as necessary
2. Seeking to understand other points of view

Self-Control

1. Taking time to reflect on a situation before responding to it
2. Maintaining confidentiality in communications
3. Accepting differences gracefully and speaking positively about others in our school community.
4. Being mindful of our commitment to the C.A.R.E.S. principles.

References

Rim-Kaufman, S. (2006). *Social and Academic Learning Study on the Contribution of the Responsive Classroom Approach*. Curry School Of Education And Center For Advanced Study Of

Teaching And Learning: University Of Virginia. Retrieved October 24, 2011, from http://www.responsiveclassroom.org/sites/default/files/pdf_files/sals_booklet_rc.pdf .

- 2. Explain the systems, practices, and traditions that the School Leader and staff will implement to foster this culture for students, teachers, administrators, and parents, starting from the first day of school. (Note! You will be asked to describe your discipline policy in the next section).**

The Responsive Classroom approach provides a structure of systems, practices, and traditions that the Sussex Montessori School teachers and school leaders will draw from. These range from classroom practices to school wide practices. These practices help children to feel safe in school. When children know routines, what to expect and when to expect it they develop confidence in themselves.

Classroom Practices:

- Morning Greetings – each child will be greeted at the classroom door by the teacher who shakes the child’s hand, is at eye level with the child, and welcomes them to the classroom.
- Morning Meeting – each classroom will begin the day using the Responsive Classroom structure for Morning Meeting which allows children and teachers to transition from home to school.
- Developing Rules – each classroom will develop rules using the Responsive Classroom approach tying rules to each child’s goal for learning. At most, classrooms will have three to five rules based on the idea of taking care of each other, taking care of yourself, and taking care of the environment. These rules mesh exactly with Maria Montessori’s goals for children in schools.
- Interactive Modeling – teachers will be trained in this explicit practice to teach procedures and routines across the school year.
- Logical Consequences – teachers will work to help students learn from their mistakes by helping them to maintain their dignity. Punishment is not an option in a Montessori classroom.
- Quiet times and spaces – the day will be structured with quiet spaces that allow for purposeful and relaxed transitions.
- Closing Circle – Each day will close with a brief gathering at the end of the day to reflect and celebrate the accomplishments from the day.

Sample School Wide Practices

- School Wide Gatherings – the school leadership will work with the teachers to determine a pattern (weekly, biweekly, monthly) for school wide gatherings. These gatherings include the components of a morning meeting school wide. Different classrooms may take a leadership role in the school wide gatherings.
- Montessori Schools value and celebrate diversity. The school leadership and teachers at Sussex Montessori Academy will determine several cultural celebrations to focus on throughout the year based on the children and their families.

- Greeting children as they enter the school – the school leader or other adult when necessary will greet children as they enter the school community each day.
- A focus on how we talk to children. The adults in the school will engage in a school-wide focus on the use of empowering language with children developing an understanding of the power of their words to shape the culture of the school community.

References:

<https://www.responsiveclassroom.org/>

- 3. Describe the key elements of the school’s bullying prevention and anti-hazing policies. Explain how the school will develop this culture and use scientifically researched-based practices for students, educators, administrators, and parents starting from the first day of school. Resources to ensure compliance with state requirements are available at:**
- <http://www.stopbullying.gov/laws/delaware.html>

Because a Montessori School focuses on the social curriculum equally with the academic curriculum, bullying is minimized. However, this does not mean that it does not exist. Sussex Montessori encourages students to show respect for differences in others, including but not limited to race, gender, and religion while fostering a school environment free from all forms of bullying and intimidation. In partnership with families the school’s focus, based on Montessori pedagogy, is on preventative measures for such behaviors, by teaching children how to:

- Be caring and courteous.
- Cooperate with others.
- Deal with negative feelings (anger, jealousy, etc.).
- Stand up for themselves and others without being aggressive.
- Engage in discussions to resolve differences, express feelings, and show empathy.
- Respect and celebrate the unique qualities of every person.

Sussex Montessori’s commitment is to:

- Encourage non-violent communication.
- Encourage teachers to embody peaceful programs against bullying and violence in their classroom curriculum in order to develop a positive educational approach to minimize such behavior.
- Encourage parents to work as a member of a peaceful team with teachers, staff, other parents, and administration to resolve issues in a way that respects the individual needs of all children and adults involved.
- Respect the privacy of student and family information, including discipline issues.
- Discuss appropriate standards of behavior and school rules with all students.
- Involve the other agencies as necessary.

While Montessori schools do not tolerate bullying and teachers take actions immediately to address such situation, they also understand that this is an opportunity to teach. Sussex Montessori School teachers will teach children what bullying looks and sounds like and how to

address it whether they are in school or in the community around the school. Because Peace Education is an integral part of the Montessori curriculum, Sussex Montessori School will focus on how to solve problems in a peaceful way rather than through bullying or violence. Specifically, the school will use the Responsive Classroom structure of class meetings and interactive modeling to provide a framework for how to address various situations children may find themselves involved in including: physical bullying, verbal bullying, and cyber bullying. Specifically, Sussex Montessori School will work to prevent bullying by:

- Ensuring that all adults in the school community understand what constitutes bullying
- Ensuring that all adults in the school community understand that they have a responsibility to stop bullying
- Explicitly teaching and providing opportunities for children to practice kind and respectful behavior and language.
- Teaching about bullying school wide, classroom wide, and to individual children.
- Empowering children to stop bullying with words that will support them in redirecting a situation.

In addition, Sussex Montessori School will follow all state required protocols for observing, intervening, and reporting incidences of bullying. We will include specific information about bullying and the state requirements for addressing bullying in the student handbook. We will require all employees, and encourage parents, to report any known incidents of bullying or willful or deliberate violence to their child's teacher and/or the Head of School within 24 hours. When such an incident is observed, employees are required to complete an Incident Report and to send copies to the Head of School. Families of the children involved in bullying or willful violence will be notified. Incidents of normal peer conflict may or may not be reported, depending on the details and events.

Based on the Responsive Classroom Approach from the Northeast Foundation for Children (<http://www.responsiveclassroom.org/about-northeast-foundation-children>).

4. Explain how the school culture will serve and support students with special needs, including students receiving special education services, English Language Learners, homeless and migrant students, and any other students at-risk of academic failure.

Peer relationships are very important in the Montessori approach. We strive to have students understand cultural aspects of other students and respect these aspects as they interact. In fact, we look at these aspects as assets to be used to create understanding in differences of culture, abilities and skills, language, living environment, and behaviors. As mentioned above, SMS will be replicating the Responsive Classroom Approach, a research-based approach to K-8 teaching that focuses on the strong link between academic success and social-emotional learning (SEL). High-quality education for every child is built on the foundation of a safe and joyful learning community. The Responsive Classroom is characterized by four main pillars:

- Engaging Academics - Teachers create learning tasks that are active, interactive, appropriately challenging, purposeful, and connected to students' interests.
- Positive Community - Teachers nurture a sense of belonging, significance, and emotional safety so that students feel comfortable taking risks and working with a variety of peers.
- Effective Management- Teachers create a calm, orderly environment that promotes autonomy and allows students to focus on learning.
- Developmental Awareness - Teachers use knowledge of child development, along with observations of students, to create a developmentally appropriate learning environment.

Student Discipline [14 Del. C. §512(6)-(7) and (11), 14 Del. C. § 4112F]

- 1. What will be the key elements of the school discipline policy, and how will it support the school culture that you describe above? Include plans regarding limitations on seclusion and restraint with respect to all students, including training and reporting requirements in accordance with 14 Del. C. § 4112F and related regulations at 14 DE Admin. Code § 610.**

Our policy is to assist children in arriving at inner discipline through concentrated work. In all areas, the child is assisted in developing the skills necessary to control their own actions to develop self-discipline. Natural or logical consequences are used as a means of helping the child to develop inner limits. However, there will be times when a child struggles to maintain control in a classroom. In this case, the following general classroom guidelines will be followed:

- If a child is disruptive or endangers others, staff immediately intervene in as positive manner as possible.
- If a child has trouble settling into the class, they are redirected to an activity by the teacher.
- If the child is still unable to settle in, the teacher will intervene and may have the child remain beside her/him until the child is able to calm down and make respectful choices.
- When an incident occurs, the teacher or staff involved will submit a summary of the incident on an Incident Report form. Behaviors that require removal from the classroom will be documented in eschool as required by regulation.
- If the behavior becomes extreme, the teacher will schedule a meeting with the parents and, depending on the circumstances, with the Head of School or appropriate staff, while the incident is still fresh in the child's mind. Staff, parents, and child will respectfully work together to modify the behavior. It is important to note that modifying the behavior will take time as the child develops inner limits.

If a pattern of willful, disruptive behavior develops:

- Teachers will record behavioral observations.
- The teacher will inform the student's parents.
- Appropriate staff will be notified.

- The student, teacher, parents, and Head of School will work together on a plan to modify behavior and when/if appropriate additional professional help will be solicited.

Unacceptable conduct is defined as any willful, deliberate behavior that creates unsafe conditions including, but not limited to, acts of bullying, willful and deliberate physical violence, harassment, and illegal acts. It does not include normal, developmentally appropriate peer conflict.

The following procedures will be followed when an occurrence or pattern of unacceptable conduct is identified:

- Verbal notification to each parent involved.
- Consultation between parent and teacher, and when appropriate Head of School or appropriate staff.
- Written plan for subsequent action and follow-up review.
- Normal, developmentally appropriate peer conflict is not included in the definition of Unacceptable Conduct, and therefore the procedures outlined above do not apply to such circumstances.

If a child persists in the unprovoked, willful, and deliberate hurting of others it may be necessary to remove the child from school to allow time for the parents, teachers, and other professionals to work on a plan to support the child. Extreme negative behavior may result in the school requiring a behavioral evaluation by a professional and alternatives to support the child.

Professional development for teachers will include all required discipline training in addition to the Responsive Classroom training.

Annual training in the discipline policy including record keeping, reporting, teacher rights and responsibilities and limitations on seclusion from classrooms or school activities and/or physical intervention clarified in **14 Del. C. § 4112F**. It will be emphasized that teachers and administrators utilize physical intervention only when there is an immediate risk to the safety of the child or the children and adults near them.

SMS will comply with the 2014 regulation requiring that at least one person in the building be trained in Crisis Prevention consistent with nationally recognized training programs that address prevention and de-escalation techniques along with positive behavioral intervention strategies and supports. A hiring preference will be included for those who have already had this training. Trained individuals will conduct the teacher training annually.

SMS will document which staff have received the appropriate training in this area each year.

1. How will the discipline policy be practiced in the classroom in order to ensure that students are working on task and focused on learning?

The word “discipline” means to “teach”. Many situations in a Montessori School are viewed as opportunities to teach. Many situations found in less engaging learning environments are avoided because children are engaged in learning. Maria Montessori initially discovered that children involved in deep, uninterrupted concentration did not disrupt or misbehave. They learned instead to “self-regulate”. Research shows that children who have the capacity for self-regulation decrease their negative, attention getting behaviors (Rathunde, K. & Csikszentmihalyi, M., 2005 & 2006). The goal in developing a school environment that supports children is to:

- Establish a calm, orderly, and safe environment for learning;
- Foster an appreciation for the role of rules in school;
- Help children develop self-control and self-discipline;
- Teach children to be responsible, contributing members of their school community, and
- promote respectful, kind, and healthy teacher-student and student-student interactions
- provide an engaging environment for learning

The Montessori approach does not rely on punishment or rewards to "get students to behave". Teachers at Sussex Montessori School will offer clear expectations for behavior, actively model and role-play behaviors that teach children how to live up to those expectations, and provide opportunities for the children to practice the rules. In fact, during the first week of school, students will participate in creating the ground rules for their classroom and classmate to follow throughout the year. These classroom rules are organic and differ year to year, classroom to classroom. When students break rules, teachers incorporate natural and logical consequences to help students learn from their mistakes.

Teachers also incorporate other strategies for resolving problems such as classroom meetings, problem solving meetings between students involved in a conflict, and positive time out spaces within the classroom for a child to regain composure.

- Rathunde, K. & Csikszentmihalyi, M. (2005A), "Middle school students' motivation and quality of experience: A comparison of Montessori and traditional school environments", *American Journal of Education* 111 (3): 341–371, doi:10.1086/428885.
- Rathunde, K. & Csikszentmihalyi, M. (2005B), "The social context of middle school: Teachers, friends, and activities in Montessori and traditional school environments", *Elementary School Journal* 106 (1): 59–79, doi:10.1086/496907.
- Rathunde, K.; Csikszentmihalyi, M. (2006). "The developing person: An experiential perspective". In Lerner (ed.), R.M.; Damon (series ed.), W. Theoretical models of human development. *Handbook of Child Psychology* (6 ed.). New York: Wiley.

2. How will you ensure that minority students and students with disabilities are not disproportionately represented in disciplinary procedures such as suspensions and expulsions? How will you measure or track this data?

As outlined above, Responsive Classroom will be the framework for developing a school culture, rules, and logical consequences. This approach has been shown to be particularly positive for students at risk of school failure and supportive of students with disabilities being part of a positive and accepting school culture. In addition, the concept of acceptance of all children and families is one that is inherent in this approach. Sussex Montessori School will continually support teachers to address issues of diversity in the classroom, equity in response to situations requiring the implementation of the discipline code, and proactive approaches to building a positive school community for all.

It will be the responsibility of the Head of School or their designee to maintain accurate records on suspensions and expulsions if they should occur and report these as a part of the annual school reporting to DDOE. This data will be analyzed each year by the leadership team and teachers in order to quickly identify any trends and to determine what steps, if any, need to be taken to ensure proper training, fair application of policies, cultural sensitivity, etc.

3. Who will be responsible for implementing the school's discipline policy? What position will be responsible for electronically reporting discipline incidents in accordance with state requirements?

All adults employed at Sussex Montessori School will be responsible for implementing the school's discipline policy. The Head of School or their designee will be ultimately responsible for reporting discipline incidents in accordance with state requirements. SMS Board of Directors will only be involved in school discipline if a child's behavior is subject to potential expulsion.

4. How will the school ensure that staff are adequately trained and properly implementing state and federal law related to the discipline of students with disabilities? Include a description of the school's specific action steps to ensure compliance with the disciplinary provisions of the Individuals with Disabilities Education Act, Section 504 of the Rehabilitation Act, and Delaware statutes and regulations.

In the case of students with disabilities, Sussex Montessori School will follow the process outlined by the Department of Education in the Administrating Manual for Services for Exceptional Students. In the case of behaviors that are related to the child's disability, the Individualized Educational Plan team will create a plan for Positive Behavior Support which will be monitored by the team and teachers. Following the Response to Intervention Model, teachers will closely monitor the child's response to various interventions suggested by the team and make resulting changes and modifications based on their data. The School will work closely with parents to determine what the best approaches are to helping a child shape their

behavior. When required, reports will be filed with the appropriate agency relating to the guidelines of DOE and the state law.

The teachers and staff at Sussex Montessori School will receive training in the various aspects of the Disabilities Education Act and Delaware statutes and regulations to ensure that the school follows all aspects of the law. New staff will have a routine introductory training and once every three years veteran staff will receive a refresher course updating them on any changes in the law.

(Note! If approved, you will be required to submit a student Code of Conduct prior to opening in accordance with 14 DE Admin. Code § 600.)

1.4 Performance Management

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-3rd 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:

Language Arts Data Collection Timeline for Summative Assessments			
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.			
DIBELS - Letter Naming Fluency, Phoneme Segmentation, Nonsense Word Fluency, Retell Fluency and Oral Reading Fluency (Kaminski, Good, Smith, & Dill, 2003). TROLL – (Dickinson, McCabe, & Sprague, 2003). Developmental Reading Assessment Text Levels and Word Analysis. (Beaver & Carter, 2003) Writing Samples – DDOE writing rubrics Spelling Inventory – Words Their Way		DIBELS - Letter Naming Fluency, Phoneme Segmentation, Nonsense Word Fluency, Retell Fluency and Oral Reading Fluency (Kaminski, Good, Smith, & Dill, 2003). Developmental Reading Assessment Text Levels and Word Analysis. (Beaver & Carter, 2003) Writing Samples – DDOE writing rubrics Spelling Inventory – Words Their Way	
	Fall	Winter	Spring
Kindergarten	DIBELS Writing Assessment	DIBELS DRA (Developmental Reading Assessment) Spelling Inventory Writing Assessment	DIBELS DRA (Developmental Reading Assessment) Spelling Inventory Writing Assessment
Grade 1	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 th grade)			DIBELS Math 3 time a year
	Anecdotal Records	Journals	Assessment Checklists	Portfolios	Embedded Benchmark Assessments	
Mathematics Processes and Proficiencies	X	X	X	X	X	
Counting and Cardinality	X	X	X	X	X	X
Numbers and Operations in Base 10	X	X	X	X	X	X
Numbers and Operations Fractions	X	X	X	X	X	
Operations/Algebraic Thinking	X	X	X	X	X	X
Geometry	X	X	X	X	X	X
Measurement and Data	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.

- 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:

Organizational Framework Area	Accountable Staff/ Board Committee	Reports to the Board:
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

- 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>

1.5 Staffing

14 Del. C. § 512(6)

Staff Structure [14 Del. C. § 512(6)]

1. Provide, as Attachment 9, organizational charts that show the school governance, management, and staffing structure in Year 1 and at full expansion. **(Note!** The organizational charts will be compared against the budget figures supplied elsewhere. The provided organizational charts and budget must align.) The organizational charts and accompanying descriptions should clearly delineate the roles and responsibilities of – and lines of authority and reporting among – the Board, staff, any related bodies (such as advisory bodies or parent/educator councils), and any external organizations that will play a role in managing the school. The organizational charts and accompanying notes or roster should identify the following:
 - a. Year 1 positions with position descriptions, including those for administrative, instructional, and non-instructional personnel;
 - b. The number of classroom educators, Paraprofessionals, any specialty educators, and contracted professional services, such as Speech Therapists, Physical Therapists, etc.;
 - c. Operational and support staff;
The reporting structure for the proposed school; and
 - d. The educator-student ratio, as well as the ratio of adults to students for the school.

(Note! The School Nurse must hold a valid standard certificate as a School Nurse, a bachelor's degree in Nursing, and a current Registered School Nurse license pursuant to 14 DE Admin Code § 1582.)

See Attachment 9 - Job Descriptions
Attachment 9A – Organizational Charts

2. If the school is part of a network of schools and/or would contract with a Charter Management Company or other education management provider, clearly show the network/provider's role in the organizational structure of the school. Explain how the relationship between the Board and the school administration will be managed.

Not applicable - SMS will not be contracting with a charter management company.

Staffing Plans, Management, and Evaluation [14 Del. C. § 512(6)]

1. Explain the relationship that will exist between the proposed charter school and its employees, including whether the employees will be at-will and whether the school will use employment contracts. If the school will use contracts, explain the nature and purpose of the contracts.

All administrators, teachers, assistant teachers, administrative assistants, paraprofessionals, custodial and maintenance employees and drivers will be state employees, subject to all employee rules and regulations, and will be receive opportunities for benefit and retirement packages as such.

Upon hire, all employees will sign an employment agreement. The purpose of the agreement is to outline the employee/employer relationship, identify the compensation and benefits offered to the employee, and detail the duties to be performed by the employee. New employee orientation will include an explanation of the school’s core values, vision, and mission. In addition, each new employee will be given an overview of the benefits program and will complete all necessary paperwork prior to employment.

All employment at SMS will be “at will.” This means that both employees and the school have the right to terminate employment at any time, with or without advance notice (though all parties may request and should try to give thirty days’ notice); and, with or without cause. However, SMS will not discharge employees for exercising their right to vote or their political affiliation; for answering the call for military service or jury duty; for exercising their right of association; for filing a worker’s compensation claim; or for receiving an order for wage garnishment.

- 2. Outline the proposed school’s salary ranges and employment benefits for all employees, as well as any incentives or reward structures that may be part of the compensation system. Explain the school’s strategy for retaining high-performing educators.**

Table of Salary Ranges:

Employees	Salary Range	
Classroom Teachers	\$38,000	\$53,000
Special Education Teachers	\$38,000	\$53,000
Counselors	\$38,000	\$53,000
School Leader	\$89,000	\$110,000
Education Director	\$65,000	\$82,400
Nurse	\$38,000	\$50,000
Clerical	\$25,000	\$40,000
Custodian	\$25,000	\$36,255
Business Manager – Part time or contacted services	\$30,000	\$35,000

Full time employees working 30+ hours per week will receive the following benefits:

Maternity Leave	Bereavement Leave	Jury Duty relief
Leave of Absence Provisions	Family and medical Leave Act	Pension

Tuition loan for Montessori Training	Blood Bank Membership	Workman's Compensation
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The Montessori environment is one that creates a supportive, need satisfying climate for all. When teachers work in an engaging, professional and respectful environment they want to stay. We anticipate high retention rates based on job satisfaction and competitive salaries.

- 3. Describe the plan and timeline for recruiting and selecting the teaching staff and other educators/professional staff. Describe the school's plan for meeting the educator certification requirements of the Delaware Charter Law, 14 Del. C. § 507, which includes ensuring that non-certified educators are participating in a Delaware approved alternative certification program. Describe any pre-service training that prepares new educators while providing an additional staff screening period for the School Leadership Team.**

The School Leader and the Sussex Montessori School Board will work together in recruiting and hiring the teachers and school support staff; as well as defining responsibilities, determining compensation for all school employees within the constraints of the school budget, and fulfilling the instructional design. The school leader will have the final authority to hire teachers and other instructional staff. The school leader will report on personnel issues and positions being posted or filled at the monthly board meeting.

The current timeline indicates that the Head of School will be hired by September 1, 2018. Posting for teacher and teacher assistant positions will be done between January and May 2019. Offers will be completed for teaching faculty by May of 2019 and the Education Director will be hired by June 2019. See Start Up Plan for additional details.

Teachers at Sussex Montessori School will need to be both DE State certified and have their Montessori Certification. While every effort will be made to recruit Montessori teachers for the first operating year, the board knows that many teachers will be just beginning their training in the summer prior to the school opening.

As a state wide advocacy organization, Montessori Works Incorporated will aid the school's recruitment efforts in the planning year by conducting events to help teachers understand what it means to teach in a Montessori School and to provide details about Montessori teacher preparation.

Sussex Montessori will conduct an aggressive recruitment campaign through local and national advertising for all open positions. Interested candidates will be screened and participate in a rigorous interview process based on national criteria around recruitment and selection. The process for hiring the school leader, teachers, and other school staff will include:

- recruitment and screening; review of credentials, background, experience, and references;
- sample lesson (if applicable); writing sample; interviews with the school leader and/or Board;

In addition, Montessori Works Incorporated is establishing a teacher certification pipeline for teachers interested in gaining a certificate in Montessori pedagogy. Currently, Montessori Works has successfully facilitated a partnership between the College of Education and Human Development at the University of Delaware and the National Center for Montessori in the Public Sector. It is envisioned that a consortium of charters and local districts will join together to send teachers who have been hired to work in a Montessori School to the program. The National Center for Montessori in the Public Sector will provide the curriculum, assist in training future local leaders to develop a locally sustainable program, and support the national accreditation with MACTE. This program is designed specifically to support teachers in public Montessori Schools including additional courses in literacy, family relationships, and children of poverty. The program includes face to face course work, online course work, and in school coaching. The program will seek Montessori Accreditation Council for Teacher Education (MACTE) accreditation. MACTE is recognized as one of the two nationally recognized accrediting agencies for teacher preparation.

If non-certified state teachers are hired on emergency certification, it will be necessary for them to successfully pass the PRAXIS I and II and to possess a nationally accredited degree in their core area of instruction. Alternatively, uncertified teachers may participate in a Delaware-approved alternative route to certification program to earn their teaching certificate. SMS will not exceed the state maximum for uncertified teachers. All teachers will be required to maintain compliance with state and Federal certification guidelines.

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

The process for hiring the school leader, teachers, and other school staff will include

- recruitment and screening;
- review of credentials, background, experience, and references;
- sample lesson (if applicable);
- writing sample;
- interviews with the school leader and/or Board;
- sample lessons;
- and recommendations and contract approvals by the Board.

The tasks and timeline for hiring may be found in Appendix D-1. As part of the pre-employment process, all employees and Board members will be required to complete a criminal background check (CBC) through the Delaware State Police. In cases where termination is necessary to ensure a safe and/or productive learning environment for the students, the following will guide the termination process:

- The school leader, in consultation with the Operating Board chair, will make the recommendation to the Board for termination of an employee.
- The employee may appeal this decision to the Board by initially informing the Board Chair of the intent to appeal in writing.
- The employee will meet with the Board and the school leader.
- A final decision will be rendered by the Board.
- Employees may also be dismissed through the DPAS II process explained in #5 below.

The complete procedures for hiring and dismissal may be found in the Employee Handbook which is included as Appendix D-2.

5. Describe how the School Leadership Team will use the Delaware Performance Appraisal System (DPAS) as required by Delaware Code and regulations or propose an alternative system. Also, explain how the school will use educator evaluation processes to provide support for educators and ultimately make decisions about retention, promotion, and advancement.

SMS's Head of School and Education Director will complete the online DPAS II Evaluator Training, accessible via the Professional Development Management System (PDMS) during the school's planning year, as required for all new administrators in Delaware public schools. The Head of School will also attend the recommended three-day, in-person DPAS II Training for New Administrators, offered in the fall of the planning year. SMS teachers who need to will complete the online DPAS II Teacher Training or DPAS II Specialist Training blackboard course available through PDMS prior to their first evaluations.

The Head of School will ensure that all observations and related materials are entered into the Evaluation Reporting System (ERS) as required by the State. To ensure fidelity to the DPAS II evaluation system the Board will monitor the progress of the school leader toward teacher evaluation timelines.

The DPAS II process will provide the backbone for feedback on teacher practice and related responsibilities in the building. Teachers who have summative ratings of 'Effective' or 'Highly Effective' may be considered for advancements, promotions, and extra responsibilities within the building. Teachers who have summative ratings of 'Needs Improvement' or 'Ineffective' will be provided with written expectations and/or improvement plans targeted at enhancing their performance.

6. Explain how the school will handle unsatisfactory educator performance, as well as educator changes and turnover.

Ultimately, teachers who do not improve and continue to exhibit patterns of ineffective teaching may be subject to dismissal.

Employees with unacceptable job performance will be notified of the need for improved

performance in written and verbal communication, and will be provided with any needed professional development and support to make improvements. In the most extreme cases (e.g., employee actions or words that harm or threaten to endanger students' well-being and behavior that creates an irrevocable breach of trust), employees may be terminated immediately.

Should a teaching vacancy arise in the middle of the year, it will be widely advertised and filled with urgency. The network of Montessori teachers known to Montessori Works, First State Montessori and others will be targeted for the advertisement of these positions.

7. Explain how and when the Board will evaluate the Principal/School Leader. What evaluation tool will be used? What key performance criteria will be examined? How will student academic growth be factored into the Principal/School Leader's evaluation?

The Executive Board will work with the Board President to evaluate the school leader. There will be an annual review using the DPAS II for Principals. The Board Chair will attend the state DPAS II training for evaluators of administrators. Goals will be established and monitored annually. Particular attention will be given to the mission specific goal of providing a Montessori education at SMS and how the school leader supports that goal. The NCMPS rubric of Essential Elements will be used as a part of this evaluation. Because the principal is ultimately responsible for student learning in the school, the evaluation will also include a review of the state assessment scores and student progress.

If the school leader does not meet performance expectations, he or she will be notified of the need for improved performance in written and verbal communication by the Board President. The Board President will meet with the school leader to create an improvement plan, and to develop a coaching schedule with a leadership coach for the school. If the improvement in leadership capacity is not realized within the developed timeframe, the Board President, with consultation of the Board, will make the decision to terminate the school leader. Employment decisions related to the school leader are at the sole discretion of the Board. In the most extreme cases described above, where students may be put in harm's way by the continuation of the school leader's employment; he or she will be terminated immediately.

In the event that the school leader is terminated, the most senior academic lead will take over the duties of the school leader, until such time as the Board President and Personnel Committee recruit, interview and replace the school leader.

8. What mechanisms or options will the Board leverage to address unsatisfactory leadership performance, should it occur, as well as turnover? What cut points within established metrics might trigger different courses of action in regards to the oversight of the Principal/School Leader?

While state assessment scores alone will not be a criterion for discipline or termination of the school leader, under performance of the school year over year may necessitate a constructive

re-evaluation of the school leader's ability to guide the school and a corrective plan should be scheduled for the subsequent academic year. If improvement does not occur, the Board will consider termination based on the evaluation.

Ratings of ineffective (1) or needs improvement (2) in any category would suggest the need for coaching or an improvement plan. See above for improvement plan management and related employment decisions.

A mismanagement of school resources resulting in jeopardizing the school's finances and operational metrics will result in a hearing and immediate dismissal if appropriate.

Professional Development [14 Del. C. § 512(6)]

- 1. Describe the professional development plan, including standards and opportunities that will be offered to the staff. Identify who will be responsible for developing, leading, and evaluating professional development at the school. This description should explain how professional development for the faculty will support the educational program and build capacity to improve student achievement. The plan must include the following:**

In their chapter focusing on *High-Quality Research-Based Professional Development*, Dagen and Bean (2014) emphasize that the research demonstrates that basic components such as a focus on content, active learning, duration and ongoing support are related to professional learning that impacts student learning. These are fairly standard themes across the research and clearly need to be considered by SMS leadership as they seek to impact the daily experience of students through the adults that work with them. However, SMS will also address this statement from Dagen "We propose a third wave, a recognition of the importance of the culture within which teachers work and the need for distributed leadership that helps teachers focus on the goal of improving student learning" as the leaders consider the ideal professional learning community to impact student learning in a Montessori School.

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

Montessori Training – Teachers who are not already Montessori prepared

Each of the lead teachers in the school will be required to be Montessori certified. As described above, Montessori Works has gained approval for a Montessori teacher training program in partnership with the National Center for Montessori in the Public Sector and the University of Delaware, College of Education and Human Development. The NCMPS program is successfully in use in Memphis, TN, Washington, DC, and Detroit, MI. This program will involve teachers who do not already have their Montessori training to attend Montessori Training on the following schedule:

Summer 2019

- 5 weeks of training on Montessori materials and curriculum prior to the school opening. This training will prepare teachers for the first year in the classroom.

School year 2019-2020

- Onsite weekly coaching provided through the training program.
- Two weekend seminars

Summer 2020

- 5 weeks of training on Montessori materials and curriculum preparing teachers for the second year in the classroom.

School year 2020-21

- Onsite weekly coaching provided through the training program.
- Two weekend seminars

Summer 2020

Final projects and portfolios completed

Five weeks summer 2019, School year 2019, and Summer 2020 - All Staff will participate in the “surround courses” provided by Montessori Works and developed by the NCMPS training program designed to better prepare teachers for work in a public Montessori setting. This includes a study of neurodevelopment, trauma, family engagement, special education in the Montessori classroom, literacy and English Language Learning. This series of 15 job embedded modules is focused on delivering a fully implemented Montessori program to high needs children.

August 26-29, 2019 – All staff will participate in a four-day Responsive Classroom I workshop. In addition, SMS teachers will review the discipline policy and be trained on appropriate use of seclusion and physical restraint per Title 14.

- b. The expected number of days/hours for professional development throughout the school year, and an explanation of how the school’s calendar, daily schedule, and staffing plan will be structured to accommodate this plan. Specify when educators will have time for common planning or collaboration and how such time will typically be used;**

During the school year, there are strategically placed Professional Development Days to allow teachers to reflect on and refine implementation of Responsive Classroom and Montessori methods.

Dates	PD Activity	Description of PD
Summer 2019 5 weeks	Montessori Teacher Preparation	It is expected that teachers who do not have Montessori certification will attend the University of Delaware program being developed in

		partnership with the National Center for Montessori in the Public Sector.
July 15-18, 2019	Developing Curriculum	Teachers will begin the job embedded Montessori modules described above and begin planning for curriculum units to be taught in 2019-20
August 26-29, 2019	Responsive Classroom training	RC week long training to take place during these four full days. Teachers will develop implementation plans
October 15, 2019	Responsive Classroom/ or continued work with UD Montessori Teacher Preparation courses	Teachers will either participate in “wrap around courses” through the UD Montessori Teacher Preparation Residency program or in further RC training.
November 25-26, 2019	Student led conferences	Teachers will also have time to review assessment data and plan for upcoming units
February 14, 2020	Responsive Classroom/ or continued work with UD Montessori Teacher Preparation courses	Teachers will either participate in “wrap around courses” through the UD Montessori Teacher Preparation Residency program or in further RC training.
May 22, 2020	Reflection/ Planning forward	Review of the year, identification of challenges and planning for next year.
June 8-10	Responsive Classroom/or Montessori Training Courses	Teachers will either participate in “wrap around courses” through the UD Montessori Teacher Preparation Residency

		program or in further RC training.
Summer 2020 5 weeks	Montessori Teacher Preparation – Part 2	It is expected that teachers who do not have Montessori certification will attend the University of Delaware program being developed in partnership with the National Center for Montessori in the Public Sector.

The daily plan will be structured to allow for teachers to have a planning period each day. However, this planning period will be structured to allow for children to have large blocks of uninterrupted time to work each day or at least for several days each week. Planning periods will allow several teachers at each age grouping to work together in a PLC model. In addition, teachers will participate in a weekly after school time using the study group model outlined below.

The expected teacher work day is 8:00 - 4:00 with the exception of the summer inservice days that will end at 5:00 and the twice weekly after school meetings that end at 4:30. Student-led conference days will use flexible scheduling to assure parent attendance outside the regular school day hours.

- c. An explanation of how professional development will be aligned with the interim (e.g. classroom, diagnostic, formative) assessments and staff evaluation processes, and how it will be adjusted during the year to address areas of need that are identified;**

During the school year, teachers will be involved in ongoing child-centered discussions. From these discussions, they will build a culture of problem-solving to best meet children’s needs, learning from each other, and developing their own professional goals as individuals and small groups. SMS will cultivate a community in which trust and openness allow for the sharing of the challenges that exist in providing students with an innovative environment supporting the individual needs of each child. To accomplish this, the school will first, establish a PLC/Study Group leadership team. Each year the PLC/Study Group leadership team will determine specific areas of focus for the school based on teacher observations, student needs, and assessment data. This will give the SMS staff a method to focus the entire community on a particular topic, which serves the purpose of moving the school forward in an effective, coordinated way. Likewise, teachers will reflect on student learning challenges in their individual classrooms to develop individual professional development goals and plans with the Head of School and Education Director. Second, the school will engage in weekly coaching with the NCMPS/MW Montessori training program. This coaching will include a weekly observation and debriefing focused on the individual teacher and the needs of the children.

The mid-year and end-year review days as outlined in the PD schedule above offer an opportunity for the teachers, Education Director and Head of School to review student progress, challenges for the school community, and to seek opportunities for embedded professional development to address student needs. In addition to summative and formative academic achievement data, the school will use the [NCMPS Rubric of Essential Elements of Montessori Practice in the Public Sector](#) to evaluate the school's status in implementing the Montessori approach. These routine reviews will keep the school's PD mission focused and targeted to the performance goals outlined in the educational plan. This process of a school wide review of data and the NCMPS rubric will ensure that the teachers and assistant teachers have a voice in the professional development plan.

d. An explanation of how the professional development program will be evaluated to assess its effectiveness and success.

The leadership team, along with lead teachers at each grade level will review a large data set at the end of each year including student assessment data, aggregated teacher observation data, results from teacher meetings, PD surveys, parent feedback, and etc. to guide planning for the subsequent school year. Teachers, students, administrators and parents are all important partners and their involvement in the school community at every level will ensure that the professional development is meeting the needs of the individual teacher and the school as a whole. All required DDOE professional development provided via PDMS will be documented as well to ensure all teachers are up to date on state requirements.

e. An explanation of the school's system for providing coaching and professional development for the School Leader. Explain how the school will know what coaching and professional development the School Leader needs

The Board President will be an advocate for the school leader to grow professionally. As a part of the routine evaluation process, the head of school and the board president will identify areas for growth. The evaluation process will consist of the DPAS II as well as the NCMPS rubric for Montessori Schools. The research on school leadership demonstrates that there are habits that support the effective functioning of learning communities. As Sally Zepeda (2013) states, "principals create conditions in the workplace that enhance the ability of other individuals to motivate themselves". This is the kind of leadership that will be required in a Montessori school. The principal of SMS will need opportunities to grow their leadership skills to assist them in thinking about the use of time and space in the day, building vertical and horizontal relationships in the school community, and observing and providing feedback in a Montessori classroom. If the School leader is not Montessori certified, they will be encouraged to complete Montessori administrative preparation prior to opening the school or soon after.

References:

Dagen, A.S. & Bean, R.M. (2014). *High-Quality Research-Based Professional Development: An Essential for Enhancing High-Quality Teaching*. Professional Development in Education.
Zepeda, S. (2013). *Professional Development: What Works*. Routledge:London.

1.6 Governance and Management.

14 *Del. C.* §§ 512(1)-(2), (6) and (9)

Charter Management Company

(Note! If the applicant plans to contract with a Charter Management Company, the applicant must complete the Charter Management Company and Highly Successful Charter School Operator Supplement in addition to the application narrative. The Supplement includes the Highly Successful School Operator Capacity section as well as the Portfolio Review and Performance Record section.)

Sussex Montessori School will not be entering into a contract with a Charter Management Organization.

Legal Status and Governing Documents [14 *Del. C.* § 512(2)]

1. **Identify the name of the organizing corporation, date of incorporation, and names of the corporation’s officers and the office held by each.**

Name of Organization: Sussex Montessori School, Inc.

Date of Incorporation: 4/4/2017

Officer’s Names and Titles:

- Linda Zankowsky, Chair
- Christine Carrino Gorowara, Co-Vice Chair
- Patricia Hermance, Co-Vice Chair
- E. McCrae Harrison, Secretary
- Mark Conces, Treasurer

2. **Attach a copy of the Articles of Incorporation, a copy of the Board bylaws, and Board policies of the corporation as Attachment 10.**

Pursuant to 14 *Del. C.* § 512(1) and (2), the bylaws must be consistent with the provisions of the Freedom of Information Act, 29 *Del. C.* Ch. 100 (related to public bodies, public records, and open meetings) and provide for representation of the school’s educators and parents of students on the Board.

The by-laws must demonstrate that the Applicant’s business is restricted to the opening and operation of charter schools, before school programs, after school programs, and educationally-related programs offered outside of the traditional school year.

Bylaws reflecting the above, along with the articles of incorporation and conflict of interest policy for Sussex Montessori School, are included in Attachment 10.

3. Provide, as Attachment 11, the completed and signed Compliance Certification Statement.

We have provided the signed Compliance Certification Statement as Attachment 11.

4. Provide, as Attachment 12, the completed and signed Application Certification Statement.

We have provided the signed Application Certification Statement as Attachment 12.

Governing Board [14 Del. C. §§ 512(1)-(2), (6) and (9)]

1. Governance Philosophy. Explain the general philosophy of governance that will guide the proposed school, including the nature and extent of involvement by key stakeholder groups. Please make sure to distinguish management versus governance responsibilities.

The Sussex Montessori School Board is committed to the development of opportunities for children to explore and learn through the Montessori learning model. The organization originated as a group of parents whose children attended the Elementary Workshop, a Wilmington, DE-based Montessori school who formed a non-profit organization, Montessori Works, that advocates for the Montessori method as an educational option for children throughout the state, particularly focusing on access to Montessori in the public schools. Montessori Works supported the creation of Montessori Academies at Christina (MAC), which operates a Montessori school-within-a-school model in two buildings in the Christina School District, as well as the public charter school First State Montessori Academy (FSMA), which Sussex Montessori School is modeled after. Members of the Montessori Works Board serve as the Sussex Montessori School Founding Board.

The Sussex Montessori School Founding Board has taken on the responsibility of preparing and submitting the charter application, and in 2018, will take on the three following primary responsibilities:

- Identifying and hiring a school leader
- Identifying and securing a school site
- Identifying and recruiting Sussex Montessori School Operational Board members who will assist as the board transforms from a founding board to the board of an operating charter school

To continue this commitment, the Sussex Montessori School Board Founding Board will identify individuals to serve on the Sussex Montessori School Operational Board in 2019 and beyond who are similarly dedicated to increasing access to Montessori education for children in Delaware.

Management of the school, including oversight of the budget, finances, human resource management, and student and teacher behavior will reside with the school leader and staff, who will ultimately report to the Sussex Montessori School Board.

2. **Structure and Composition. Describe the size, current and desired composition, powers, and duties of the Board. Identify key skills, areas of expertise, and constituencies that will be represented on the Board. Explain how this governance structure and composition will help ensure that:**
 - a. **The school will be an educational and operational success; and**
 - b. **There will be active and effective representation of key stakeholders. (Note: Pursuant to 14 Del. C. § 512(1), the Board must ensure representation by an educator from at least one of the charter schools operated by the Board and at least one parent of a student enrolled in a charter school operated by the Board.)**

The Sussex Montessori School Founding Board currently consists of 9 members.

Expertise on the Board includes:

- 5 who work in education, including a current public school Montessori teacher, a current public school special education teacher, a former charter head of school, a former independent Montessori head of school, and two teacher preparation professionals
- 1 banker
- 1 employment specialist
- 2 Sussex County real estate agents

The SMS Board is expected to consist of 3-10 members, including:

- At least one Sussex Montessori School teacher
- At least one Sussex Montessori School parent
- Community members, some of whom will have expertise in finance and/or law,

Two Sussex Montessori School Founding Board members live in Sussex County and are anticipated to also serve on the Sussex Montessori School Board beyond the founding year. Additional Founding Board members with special expertise or interest may also join the Board beyond the founding year.

3. **Roles. Describe the primary roles of the Board and how it will interact with the Principal/School Leader and any advisory bodies. List all currently-identified Board members and their intended roles, and summarize their interests in and qualifications for serving on the school’s Board.**

The Sussex Montessori School Board will oversee the school leader’s roles and responsibilities, and the school leader will ultimately be accountable to the Board. We anticipate that the Board will consist of persons with expertise in the areas of law, finance, education, the Sussex County community, and communications/public relations.

The current board members are as follows:

- Linda Zankowsky, Chair
Dr. Zankowsky has been a school leader both in the public sector and at an independent Montessori school, and is currently the director of an early learning center. She is also a Montessori parent.
- Christine Carrino Gorowara, Co-Vice Chair
Dr. Gorowara is a teacher educator and a former Montessori parent.
- Patricia Hermance, Co-Vice Chair
Ms. Hermance is a former Delaware charter head of school, and currently works with teacher professional development.
- E. McCrae Harrison, Secretary
Ms. Harrison is a longtime Montessori educator who has served as both teacher and head of school.
- Mark Conces, Treasurer
Mr. Conces is a finance professional and a former Montessori parent.
- Jessica Crampton Bradley
Ms. Bradley is the grandparent of young children, a Sussex County real estate agent, and is active in the Sussex community.
- Jesse Reeves
Mr. Reeves is a human resources specialist, a former Montessori parent, and a longtime member of the Sussex Montessori School founding organization, Montessori Works.
- Scott Richardson
Dr. Richardson is a special educator and an educational researcher as well as a Montessori parent.
- Sean Steward
Mr. Steward is a parent of young children, a Sussex County real estate agent, and is active in the Sussex community.

4. **As Attachment 13, provide a completed and signed Charter School Board Member Information Form for each proposed Board member.**

We have attached completed Charter School Board Member Information Forms for all nine Sussex Montessori School Founding Board members.

5. **As Attachment 14, provide a completed and signed Charter School Board Member Disclosures Form for each proposed Board member.**

We have attached completed Charter School Board Member Disclosure Forms for all nine Sussex Montessori School Founding Board members.

Procedures. Explain the procedure by which Board members have been and will be selected. How will the Board fulfill its responsibilities? What will be the planned frequency and focus of meetings? Identify any standing subcommittees the Board expects to have. Describe how the school and Board will comply with Freedom of Information Act, 29 Del. C.Ch. 100 (related to public bodies, public records, and open meetings).

Board member selection: The Sussex Montessori Founding Board members are members of the Montessori Works, Inc. Board who have been working in various capacities for the past several years on laying the groundwork for this charter application. They bring a wealth of experience and commitment to accessible Montessori education to the board.

In addition, anticipating the Montessori Works board members' role as founding board members for Sussex Montessori School, members have been recruited in recent years who are from the Sussex community, and/or who have specific areas of expertise such as real estate, finance, legal, and educational.

Ongoing board member selection will continue to identify individuals active in the Sussex community, particularly prospective Sussex Montessori School parents and teachers, as well as members with the expertise described above. Prospective board members will be asked to submit a résumé for consideration, and may meet with existing board members in person prior to a vote on their membership to the Sussex Montessori School Board.

Meetings: The Sussex Montessori School Board will hold regularly scheduled meetings once a month and special meetings as needed. Upon approval of its charter application, Sussex Montessori School meetings will be open to the public, subject to the requirements of the State of Delaware Freedom of Information Act and Open Meeting Act. Agendas and notification of its meetings will be published at least 7 days prior to the meeting. The Board will also publish its financial statements and minutes on its website for open inspection.

Committees: The bylaws of the Sussex Montessori School Board calls for five standing committees: Executive Committee, Finance Committee, Governance Committee, Development Committee, and Academic Excellence Committee. The bylaws also establish the role of the Board treasurer to act as liaison to the Citizen Budget Oversight Committee.

6. School Oversight

- a. **Describe how the Board will approach its oversight role. Describe the metrics or progress indicators that the Board will consider in its analysis of the school, as well as how the Board will receive this information (i.e., dashboard) and from whom (i.e., Principal/School Leader, Business Manager, committees). Be sure to include both the academic, financial and operational metrics, and the frequency with which the Board will review these metrics.**

The Sussex Montessori School Board will oversee the activities of the school leader, who will be subject to an evaluation process. This evaluation process will include three quarterly informal assessments of school operations and one annual formal evaluation. The school leader will prepare reports on selected metrics for the Board.

Performance metrics for the position will include:

- School open and closes on time and as expected on a daily and annual basis
- School meets DOE compliance requirements for charters school per DOE regulatory guidance
- School sustains and/or grows student enrollment over the course of the school year
- Individual student performance shows expected growth
- Low absentee and student discipline cases
- Low vacancy and turnover rates of personnel
- Ongoing offerings of professional development
- Authenticity of the school program to the Montessori approach (see part e. below)

Additionally, the Board will rely on the Citizen Budget Oversight Committee to report on financial indicators as described in the Delaware Financial Performance Framework.

- b. **Describe the financial policies and procedures that the Board and administration will implement and follow in order to ensure that the school remains fiscally solvent and that appropriate internal controls are implemented.**

Governance: As noted above, the bylaws establish a standing Finance Committee as well as the role of the Board treasurer as liaison to the Citizen Budget Oversight Committee.

Accountability: It is the intent of the Sussex Montessori School Board to ensure that a) no audit findings of significant or material nature are identified in any post-transactional audits; b) that no conflicts of interest exist in the procurement of goods and services; and c) that management controls are in place to ensure that there is no conflict of interest, malfeasance or financial improprieties.

All appropriate financial transactions will be transacted through the First State Financial System and all payroll and other personnel functions will be performed through the State of Delaware’s Payroll Human Resources Statewide Technology. All financial transactions, budgets, financial reports and audits will be posted on the Sussex Montessori School website within one week of approval by the Board.

- c. **Describe an, at a minimum, annual process for evaluating whether financial allocations have effectively supported the school in carrying out its mission and meeting its goals.**

The Sussex Montessori School Board will approve a five-year budget based on projected enrollment targets for the school, and on alignment of the proposed budget to the goals and mission of the school. This will serve as a planning tool and will be adjusted each year to reflect changes in expected enrollment.

The Board will approve an annual budget for each approaching school year at the close of the Choice Period (January) with revisions performed after the required April 1 submission of the enrollment data to the Department of Education. The budget will be adjusted based on the enrollment and unit count determination after April 1. A subsequent revision will occur after the official unit period ending September 30. The budget will be reviewed against actual transactions each month.

- d. **Identify the enrollment threshold that would compel the Board to delay opening the school and explain why.**

Sussex Montessori School is projecting 260 students to be enrolled in Year 1, growing to 455 students by Year 4. The school intends to meet at minimum 80% of its projected enrollment (208 students) in order to maintain financial sustainability.

Aside from enrollment, the two factors affecting the opening of the school is school building readiness and obtaining qualified Montessori teachers.

- With respect to the building, the Sussex Montessori School Board has prepared facility schematics to understand the capital needs of the school and has identified several promising sites. The Board will evaluate these options after our April approval and inform the Department of Education of our progress.
- With respect to the availability of certified teachers, Montessori Works, Inc. is developing a Montessori certification pipeline program in partnership with the University of Delaware. The program, which is funded through the Longwood Foundation, is designed to advance the certification for public school teachers who are interested in expanding their range of skills and potential career opportunities. A number of teachers for Sussex Montessori School will go through this certification program. In addition, Montessori Works is well-networked through the country to find available teachers.

- e. **Describe how the Board and School Leadership Team will utilize the school’s mission in everyday practice and decision-making?**

The Board will use the National Center for Montessori in the Public Sector’s rubric (<http://www.public-montessori.org/resources/ncmps-rubric-essential-elements-montessori-practice-public-sector>) to evaluate the school program with the school leader and ensure that it maintains its authenticity to the Montessori approach.

- f. **Describe the School Leader contract. Identify whether there will be performance targets in that contract and, if so, what they are.**

As noted above, performance targets for the school leader will include:

- School open and closes on time and as expected on a daily and annual basis
- School meets DOE compliance requirements for charters school per DOE regulatory guidance
- School sustains and/or grows student enrollment over the course of the school year
- Individual student performance shows expected growth
- Low absentee and student discipline cases
- Low vacancy and turnover rates of personnel
- Ongoing offerings of professional development

7. **Board Improvement. Explain the plan for increasing the capacity of the Board. What kinds of orientation or training will new Board members receive? Describe how the Board will evaluate itself and what steps it will take to continually improve its capacity to govern. Describe how current and future Board members will comply with any statutory or regulatory requirement related to the training of Board members.**

All Board members will be required to participate in a Department of Education-approved program for financial accountability and special education legal requirements. In addition, the Sussex Montessori School Board will contract with the Delaware Association of Nonprofit Agencies (DANA) to obtain training on Board activities, including:

- Marketing and Communication of your Mission
- Program Evaluation and Outcomes Measurement
- Human Resources and Volunteers
- Fundraising
- Finance & Legal
- Public Advocacy, Affairs, & Policy
- Governing Body Development
- Succession Planning

- Customer/Client Service
- Sustainability/Organizational Life Cycles

Board training would be done during the founding year, the second year, which would be the first year of the operational board, then every three years thereafter, which would ensure that all board members would be trained sometime during their three-year terms.

- 8. Board Continuity. Describe how, and on what timeline, new Board members will be recruited and added. Explain how the Board will screen successor members of the Board to ensure continuing compliance with the requirements that the Board be qualified to operate a charter school and to implement the school’s proposed educational program.**

As the school matures, we anticipate recruiting Board members from an ever-increasing pool of business, community and parent volunteers. As the bylaws indicate, Board members will be added each year, and after the founding year will have three-year terms. Prospective Board members will submit résumés to the serving Board for their consideration. As noted above, all board members will be trained at least once during their three-year terms.

- 9. Ethics and Conflicts of Interest. Describe the Board’s ethical standards and procedures for identifying and addressing conflicts of interest and compliance with the State Code of Conduct.**

The Sussex Montessori School Board Conflict of Interest Policy is included in Attachment 10. All Board members will complete and sign the Sussex Montessori School Board Conflict of Interest Questionnaire.

Advisory Bodies [14 Del. C. §§ 512(1)-(2) and (6)]

- 1. Describe any advisory bodies or councils to be formed, including the roles and duties of these bodies. Describe the following: the planned composition of the advisory body; the strategy for achieving that composition; the role of parents, students, and educators (if applicable); and the reporting structure as it relates to the school’s governing body and leadership.**

The Montessori Works, Inc. Board will serve as an Advisory Board for the purpose of fundraising and development, and for ensuring the integrity of the Montessori educational model.

Grievance Process [14 Del. C. § 512(9)]

- 1. Explain the process that the school will follow should a parent, student or staff member have an objection to a governing board policy or decision, administrative procedure, or practice at the school.**

All teachers, staff and parents are encouraged to share their concerns about the operations of the school with the school leader. The school will have a process for the filing of grievances which will include interviews with the school leader, written documentation to support claims and if necessary, observations of individuals in question.

The school leader will share with the Sussex Montessori School Board all incidences of filed grievance and infractions of state law or regulations as soon as practicable. The Sussex Montessori School Board will not act unless requested by the school leader. Parents and teachers will have an opportunity to appeal to the Sussex Montessori School Board if there is a claim of inaction or lack of due process on the part of the school leader , which will issue an initial decision of whether or not to hear the grievance.

If the school leader is subject to the grievance, interviews with all of the actors will occur by the Sussex Montessori School Board. The Sussex Montessori School Board will be notified of the incident and take appropriate action.

Any action which constitutes criminal activity will be referred to law enforcement authorities immediately, for which the criminal justice process will take precedent.

2. Identify the goals of the Board of Directors in terms of monitoring and resolving staff and parent complaints.

The goals of monitoring and resolving staff and parent complaints are two-fold:

- To provide appropriate and timely due process for students, parents and teachers in incidences which impact a child's learning opportunity;
- To allow constructive dialogue to occur to improve the school's delivery of its program. All complaints will be view within a framework of how the school can improve its delivery of quality education to the students.

1.7 Parent and Community Involvement

14 *Del. C. §§ 512(1) and (6)*,

Parent Involvement

1. Describe the role of any parents/guardians and community members involved in developing the proposed school.

Sussex Montessori school recognizes that parents and community stakeholders who care about their child's education will be fundamental to ensure the success of Sussex Montessori School. During the application process, we have increased the awareness of parents and guardians about the school and to activate the community via community meetings and social networking to share about Sussex Montessori School with friends and colleagues. At the time of this application, Sussex Montessori School has identified 30+ potential volunteers, 70+ community members to continue sharing about the school with friends and colleagues, and 17 community members who are interested in teaching in the school (Attachment 7).

The current founding board has two Sussex County residents on the board. During the development of the application, Montessori Works has had four Sussex County residents serve as board members. As the application proceeds through the process for confirmation, the founding board will continue to reach out to community members with community meetings and informational sessions about the school. The goal of these meetings will be to develop a strong foundation of parents/ guardians and community members to serve on the operating board, working committees for the planning year and into the first years of operation. Specific tactics for recruiting Board and committee members from the SMS community include 1) establishing a committee of the Board that is responsible for identifying new Board and committee members, 2) assessing a prospective member's interest, 3) clearly communicating the responsibilities and expectations of members, and 4) inviting prospective members to open meetings.

Opportunities for board leadership and committee involvement will include serving on the:

- founding board and continuing to the operational board
- community financial oversight committee
- facilities committee
- marketing and fundraising committee
- human resources committee
- special project committees such as gardens, library support, and other volunteer needs for the school

2. Describe the outreach that you have conducted to engage prospective parents/guardians in the area you are proposing to serve.

Montessori Works (MW) is the organization that has fostered the community engagement that Sussex Montessori School will build on in the year ahead. The board of Montessori Works has had extensive communication with parents, business leaders and civic officials during over the past four years. Much of this has been one on one meetings with community leaders, groups, and business leaders. In July, 2017 Montessori Works engaged Sussex County resident Jim Purcell to support our community engagement efforts. In addition, Montessori Works launched a social medial campaign (described below) in the late summer of 2018 which has greatly enhanced the community awareness and support for the school. Montessori Works has had several articles both print and online in the Sussex County newspapers ([Milford Live](#); [Cape Gazette](#)).

Sussex Montessori will continue and expand to more events to specifically market the school to families throughout the next 18 months as Sussex Montessori School prepares to enroll students. Please see Educational Plan 1.3 for a description of planned recruiting activities.

Presentations and Meetings:

- Meetings with business leaders to discuss the school, educate the leaders on its benefits and ask for financial and facilities support for the school;
- Presentations at local community groups such as the County Chamber of Commerce, Rotary Clubs, Lions Clubs, First State Community Action Council, Sussex Early Childhood Council, Leadership Delaware, etc.
- Marketed the school to all day cares and kindergartens in the Georgetown-Laurel- Seaford- Bridgeville corridor;
- Meetings with Sussex County civic leaders, including state legislators and county administrators;
- Meetings with school district leaders.

Social Network Campaign:

During the summer of 2017 Montessori Works began a social networking campaign targeted to Sussex County for Sussex Montessori School. We insured that links to the Sussex Montessori School Interest Surveys were available in both English and Spanish on the [Montessori Works](#) web site. <https://montessoriworksde.org/sussex-montessori-school-2/> The Facebook page, [Citizens for Sussex Montessori school](#) launched in late October of 2017 <https://www.facebook.com/MontessoriDE/>. The site has steadily increased in activity over the 52 days it has been available with a 28-day reach of 7237.

Sampling of community leaders engaged in this conversation:

Government

- Representative Danny Short
- Senator Bryant Richardson
- Senator Ernie Lopez
- Representative Ruth Briggs King

- Representative Harvey Kenton
- Representative Dave Wilson
- Representative Pete Schwartzkopf
- Representative Lyndon Yearick
- Senator Gary Simpson
- Seaford Mayor David Genshaw
- Milford Mayor Bryan Shupe
- Milford City Manager – Eric Norenberg
- Milford Councilperson Lisa Ingram Peel
- Milford Councilperson James Burk
- Milford Councilperson Katrina Wilson
- Karen McGrath, Sussex County Regional Director, Senator Carper’s office
- David Starr, Senator Carper’s Office
- Andrew Shine, Senator Carper’s Office
- Larry Windley, Senator Carper’s Office
- I.G. Burton, Sussex County Council Representative
- Todd Lawson, Sussex County Administrator

School District/Education

- Ashley Giska, Assistant Superintendent Laurel School District
- Susan Bunting, in her role as Superintendent Indian River School District
- Dave Parrington, Superintendent Seaford School District
- Kevin Dickerson, Superintendent Milford School District
- Sara Croce, Chief Financial Office Milford School District
- Jason Peel, Director of HR and School Climate, Milford School District
- Heath Chasanov, Superintendent Woodbridge School District
- Chris Kenton, Delaware Department of Education
- Kendall Masset, Delaware Charter School Network

Community Leaders

- Thomas E. Brown, Senior Vice President Nanticoke Hospital
- Alan Levin, Advisor, SoDel Concepts
- Amy Higgins, Owner, The Guide (resort magazine) and Seaford High Graduate
- Jeff Banning, Owner of Trinity Logistics
- Bill Allan, Head Delaware Community Foundation in Georgetown
- John Hollis, Lobbyist for Nemours and founder of the Merit Program. Mr. Hollis is also involved with Boys and Girls Clubs
- Rob Liles, Insight Homes
- Bernice Edwards, Executive Director of First State Community Action
- Trish Oliphant, Head of School at Sussex Academy
- Joe Schell, Local developer and benefactor of Sussex Academy

- Amy Walls, Assistant CRA Director, Discover Bank. Discover Bank provided MW with \$20,000 in donations to provide community engagement activities
- Claudia Poretti, Former head of La Esperanza, now Vice President at Latin American Community Center
- Peggy Geisler, Sussex County Health Coalition
- Charito Mateyko, Activist, Hispanic Business Commission
- Wendy Bull, Teach for America
- Alison Rohrer, Lives in Seaford and has been a significant volunteer engaging parents and the community in this initiative
- Sally Beaumont, Board President of Primeros Passos
- Bryce Lingo, President of Lingo Realty, Lewes
- Dave Burton
- Mike Rawl, Horizon Philanthropic
- Mark Chura, Chura and Associates

Community Business

- Bay Health Medical
- Nationwide Health Services
- KSI Services
- Dentsply Corporation
- First State Manufacturing
- Beebe Hospital

Day Care and Pre-School Centers

- Beach Babies
- Kids Cottage, Lewes
- Del Tech Early Childhood Center, Georgetown
- The Breakfast Club, Milford
- TLC, Milford
- Avenue Pre-School, Milford
- Milford Boys and Girls Club

Sample Community Events:

- Hispanic Festival, Georgetown
- Boo-Que Festival, Indian River State Park
- Charter School Symposium for Southern Delaware

3. **Describe how you will engage parents/guardians in the life of the school, in addition to any proposed governance roles described above. Describe how the school will build family-school partnerships to strengthen support for learning and encourage parental involvement. Describe any commitments or volunteer activities that the school will offer to parents.**

SMS will be focused on the whole child and that includes working with parents and the community in providing students with experiences both inside and outside the classroom. We encourage parents to engage with students in much the same way teachers engage with students, guiding them through real-life experiences which build confidence, knowledge, critical decision-making skills. In addition, the community plays a part in building a student's confidence, experience and knowledge in playing a role in society and preparing them to be good citizens.

SMS will develop an admissions process that creates opportunities for parental/guardian education about the philosophy and expectations of the Montessori method and seeks a commitment from parents to participate in their child's education. SMS will hold parent seminars to assist parents in understanding the Montessori philosophy, to apply it to their household experiences, and how to interact with their child in a similar way as the classroom teacher, (i.e. providing choices, managing expectations).

Parents and community members are encouraged to volunteer to support the school through mentoring, supporting extracurricular activity, providing facility support and clean-up, hosting new families and working with the students in outside activities. For instance, parents will be engaged to perform an annual cleanup of the building grounds and classrooms at the close of the school year. Other types of parent involvement include:

- Parents and volunteers will form volunteer committees to plan, setup and attend functions for student support, activities and fundraising.
- A parent-teacher organization will be formed to provide a forum for dialogue on matters pertaining to the culture and organization of the school.
- As required by law, a Citizens Budget Oversight Board will be formed for community members to gain insight and input into the financial management of the school and preparation of budgets to ensure the financial soundness of the school and preserve the academic integrity of the programs.

SMS is specifically targeting families from Western Sussex County where there is a larger Hispanic population. We welcome parents to share their culture, celebrations, and family history with the SMS students. SMS will need to provide for translation services to assist some families to fully participate in the school community.

Community Involvement

- 1. Describe how community members are represented on your Board and in your Founding Group?**

The Sussex Montessori School Founding Board currently consists of 9 members. Expertise on the Board includes:

- 5 who work in education, including a current public-school Montessori teacher, a current public school special education teacher, a former charter head of school, a former independent Montessori head of school, and two teacher preparation professionals
- 1 banker
- 1 employment specialist
- 2 Sussex County real estate agents

The SMS Board is expected to consist of 3-10 members, including:

- At least one Sussex Montessori School teacher
- At least one Sussex Montessori School parent
- Community members, some of whom will have expertise in finance and/or law,

Two Sussex Montessori School Founding Board members live in Sussex County and are anticipated to also serve on the Sussex Montessori School Board beyond the founding year. Additional Founding Board members with special expertise or interest may also join the Board beyond the founding year.

2. Identify what community resources will be available to students and parents. Describe any partnerships that the school will have with community organizations, businesses, or other educational institutions. Specify the nature, purposes, terms, and scope of services of any such partnerships.

Sussex Montessori School anticipates building on its developing relationships with community organizations in Sussex County. No specific contracts or scopes of services have been developed at this time. This will be a focus for the School Leader and Founding Board in the summer/fall of 2018. Examples of potential partnerships include:

- The Summer Collaborative for summer programming.
- La Esperanza to support families who are in need of immigration support and family counseling services.
- First State Community Action for summer camp, after school, and family support services.
- Boys and Girls Clubs of Sussex County
- Sussex County Health Coalition

3. Describe any fee-based or in-kind commitments from community organizations or individuals that would enrich student-learning opportunities.

The Montessori Approach emphasizes the need for children to experience life outside the classroom as they do inside the classroom, with freedom to explore. The SMS will offer, but

will not require, students to participate in extracurricular activities. We intend to form alliances with outside organizations to provide opportunities for families to engage in exploratory learning. Given the rural nature of Sussex County and its access to oceans and inland bays, we will align with programs in the environmental and agricultural sciences and marine studies programs, particularly through the University of Delaware and Delaware Technical and Community College. Students will be able to participate in a multitude of summer camps and learning collaboratives, including Future Farmers of America, 4 H Clubs, Boys and Girls Clubs and Junior Achievement. We will also offer dance and drama programs, health and wellness programs such as yoga and meditation, and visual arts programs.

4. Provide, as Attachment 15, evidence of support from community partners, which may include letters of intent/commitment, memoranda of understanding, and/or contracts, and should specify the resources to be committed or contributed from the partner, as applicable.

Attachment 15 includes letters of support for various purposes:

Financial Support:

- Longwood Foundation for Sussex Montessori School (facility and school leader)
- Longwood Foundation for Montessori Works to continue to support Sussex Montessori School (fund raising and facility development)
- Welfare Foundation for Sussex Montessori School (teacher training grants and Montessori classroom materials)

Specific Intents and Commitments

- NCall Loan Fund Letter of Interest
- Lead for Delaware to support a search for school leadership and teachers.
- Horizon Philanthropic to develop a fund-raising campaign to be launched upon approval of the school. Horizon is a long standing philanthropic organization that focuses on raising money for non-profits in Sussex County. This campaign will continue to raise awareness of and garner community support for the school.
- Mark Chura of Chura and Associates to identify a facility and support the work required to repurpose a facility for the school. Chura and Associates has a strong reputation for working with non-profits in Sussex County.
- Nationwide Healthcare Services, LLC regarding a potential site for the school
- James D. Taylor, Jr to provide legal guidance

General letters of support from community leaders:

- David Genshaw, Mayor of Seaford
- Thomas E. Brown, Nanticoke Health Services
- Bryce Lingo, Lingo Realtors
- Peggy Geisler, Sussex County Health Coalition
- Tom Thunstrom, Sand Dollar Nonprofit Solutions

- Claudia Porretti, J.D., CRFE , Latin American Community Center
- Laurisa Schutt, Teach for America
- Diane Willoughby, Cadbury at Home
- Other Community Leaders

1.8 Start-up and Operations

14 Del. C. §§ 512(1), (8)-(10), and (12)-(13)

1. **Start-Up Plan. Provide, as Attachment 16, a detailed start-up plan for the school, specifying tasks, timelines, and responsible individuals, which is aligned with a sound Start-Up Budget. The plan must include such milestones as:**
 - Identifying and hiring key personnel;
 - Creating and/or finalizing curriculum, including purchasing assessment and materials;
 - Creating discipline, attendance, promotion, and grading policies approved by your school's Board of Directors and the Department;
 - Hiring instructional staff;
 - Having in place the major contracts necessary for the school to open on schedule. Major contracts shall include, without limitation, the school's contracts for equipment, services (including bus and food services, and related services for special education), leases of real and personal property, the purchase of real property, the construction or renovation of improvements to real property, and insurance. **(Note! Contracts for bus and food services must be in place no later than August 1st of the year in which the school proposes to open and August 1st of each year thereafter.)**
 - Engaging the community and recruiting students; and
 - Other planning activities.

The start-up plan for the Sussex Montessori School is included in Attachment 16, which identifies specific tasks, timelines and individuals responsible for the start-up operations of the school. Accompanying budget information is provided in Attachment 16.

2. **Describe what you anticipate will be the challenges of starting a new school and how you expect to address these challenges.**

The Sussex Montessori School anticipates that its challenges will occur surrounding two areas:

- a) **Financing/Funding:** Financing a facility and a head of school in the planning year is a challenge faced by all charter schools in Delaware.

Montessori Works, whose mission is to expand Montessori education in Delaware has created a solid foundation for the Sussex Montessori Board to build on. Montessori Works has:

- over the past 4 years, raised \$253,000 used to support community engagement activities and to provide for consulting expertise in the development of the charter application.

- has secured letters of support for the planning year from the Longwood and Welfare Foundations for potential funding upon approval of the charter application.
 - begun conversations with local banks and NCALL (letter of interest included in attachments) to address potential financing for the facility.
 - begun development of a plan with Horizon Philanthropic to raise funding in Sussex County for the school. Horizon Philanthropic will be available to the board of SMS to continue the fundraising campaign for Sussex Montessori School upon approval.
 - Has engaged Mark Chura, of Chura Associates to manage the acquisition of or leasing of property, financing, and renovations or construction.
 - Will support the school to engage a consultant knowledgeable in the writing of Non-SEA grants or other national foundation grants. National grantees such as the Kellogg Foundation have supported Montessori schools serving communities such as those in Western Sussex County.
- b) Facilities: Facilities are always a challenge for Delaware charter schools. Sussex Montessori school has identified three potential sites which are described in section 9. The board anticipates a final decision on property at the time of or shortly after approval in April 2018 for the school to open in September 2019. Execution of leases and capital funding will be identified prior to December 2018, while renovation and occupancy will occur by June 2019. Sussex Montessori school will benefit from the relationship established by Montessori Works with Mark Chura, who is handling the project management for the initial identification of a site during the prior to and during the application process and will be available to the board of SMS to continue in the role of project manager for Sussex Montessori School upon approval.
- c) Transportation: Due to the rural nature of the county, transportation distances and times will require additional buses to ensure that students will arrive in time for school within spending inordinate travel time. Finding bus providers in this area will be more difficult than in other parts of the state and contracts with local school districts may be necessary. Sussex Montessori's site choices positions the school to establish partnerships with local school districts.

3. Complete the Start-Up (Year 0) Budget in the Budget Sheets. Complete all pages in the Budget Sheets, and provide as Attachment 17 (see link in Section 1.10 Budget and Finance).

Please see attachment 17 for the Planning Year budget for 2017-2018. The planning year budget accounts for the following:

- Marketing for and hiring a Head of School upon approval of the charter application
- Salary and OEC for the Head of School
- Salary and OEC for administrative support beginning in January 2019

- Professional development for the head of school and board
- Marketing for and hiring teachers
- Montessori training for teachers
- Montessori materials for the first operating year
- Financing costs for facility
- Repurposing facility or purchasing modular units depending on site.

4. Transportation. Describe how students will be transported to the school pursuant to 14 Del. C. § 508, including any provisions that the school will provide; how students who reside outside the district in which the school will be located will be transported to the school; and how students with special needs will be transported if specialized transportation is required by the student’s IEP.

SMS will contract bus transportation services to get students to and from school. Such services will be secured using a highly reputable and insured firm that specializes in the student transportation business. Based on the enrollment reported each April to the DDOE, the School Leader and Business Manager will open the bus routes to a public bidding process monitored by a subcommittee of the Operating Board. Bus routes will be established for those students who live within the district in which SMS is located.

SMS will make every effort to accommodate transportation to and from the school beyond any single school district by establishing central hub points outside of the district for student pickup and drop-off. The School Leader, along with support staff, (starting in 2018-19) will work with the transportation company planners to identify and establish convenient spoke and hub configurations that maximize student access and minimize ride times while seeking the most efficient and cost-effective means of getting students to and from the school campus location. Parents or guardians of students living outside of the district the school is located on will be responsible for transporting their child to and from the bus stop.

Appropriate accommodations, as defined in the students’ Individual Education Plans (IEP), will be provided to meet the needs of all special needs students requiring transportation. As special transportation needs are identified, the school will work with the students’ parents and the transportation services company to ensure compliance with specialized transportation needs. As field trips and other such events are planned, arrangements will be made through the school’s contracted transportation services provider.

Describe the plan for oversight of transportation operations (e.g., whether the school will provide its own transportation, contract out for transportation, request that a district provide transportation, or a combination thereof) and who on the school staff will provide this daily oversight.

In addition to the bidding and route development process outlined above, the SMS Business Manager with support from the school leader will oversee the routine student transportation services. This includes:

- keeping open lines of communications with the bus drivers and occasionally riding along on the morning route to ensure the integrity of the transportation system and attain firsthand knowledge of the bus environment. Additionally, SMS will strive to have quarterly meetings with drivers and the Business Manager will work to establish regular, informal rapport with the bus drivers.
- overseeing bus routing and transportation operations, and scheduling and supervising bus safety drills.
- putting into place by April 2019 a transportation contingency plan to address transportation emergencies. This plan will be created in concert with the procedures put in place by the busing company. It will include:
 - training for all staff and drivers in the contingency plan,
 - a list of contact names and phone numbers at the school, beginning with the school leader and then down the chain of command that has been established,
 - a plan for providing support at the site of an accident, (School Leader, back-up in the event that School Leader is not available)
 - plans for providing support at the school, (Education Director, back-up in the event that the Education Director is not available)
 - communication plans for parents, DDOE, and the general public, identifying the main person responsible for communications, messaging, and training in emergency communications,
 - and, plans for further support at the site or at the school to ensure the safety of all students.

The school leader will ensure:

- that they monitor and approve all plans developed,
- that the above plans are communicated annually to the operating board for feedback and approval of contracts,
- that there is appropriate staff coverage to supervise busses at arrival and dismissal,
- that appropriate time is set aside to train all staff in the emergency plan,
- and that practice drills are carried out according to the plan.

5. **Safety and Security.**

- a. **Describe your plan for safety and security for students, staff, guests, and property.**
- b. **Explain the types of safety and security personnel, technology, equipment, and policies that the school will employ to provide a safe and healthy environment in accordance with 14 Del. C. § 512(12) and the safety provisions included in the Compliance Certification Statement.**
- c. **Explain your process to create and maintain the required emergency preparedness plan that is in compliance with the Emergency Preparedness Guidelines established by 29 Del. C. § 8237 and 14 DE Admin. Code § 621, [and approved by the](#) Department of**

Safety and Homeland Security (DSHS). Identify which position will have primary responsibility for this plan.

- a. **General Safety Plans**
- b. **Safety and Security personnel, technology, equipment and policies**

Ensuring the health and safety of Sussex Montessori School students, guests, staff and parents will be the responsibility of all staff members. The school will make every effort to employ best practices in managing the health and safety of students, staff and guests.

The school leader will maintain primary responsibility for oversight and management of health, safety, and security policies and practices. SMS will implement a comprehensive set of health, safety, and risk management policies and practices, which will be communicated to parents, students and staff as part of enrollment procedures and various orientation programs. The school leader, in consultation with the operating board, will establish a School Safety Committee to serve as a clearing house for the discussion of issues, policies and practices related to the safety of students, parents and staff. Committee representation will include, but may not be limited to, the school leadership team, teachers, the school nurse, the custodian and a parent.

By June 2019 a Health and Safety Manual will be completed addressing but not limited to the following:

- general safety precautions,
- guest sign-in and sign-out procedures,
- procedures for fire drills, lock-downs, and other emergencies,
- emergency plans, drop-off and dismissal routines,
- medication administration guidelines,
- first aid, infectious disease,
- playground rules

Building Access/ Safety

In the interest of safety for students, staff, and visitors, “controlled access” to the school facility will be maintained at all times. A security system will provide visual live feeds of all building entrance locations, as well as other key spaces inside and outside the building. All outside doors will remain locked from the outside, except during student arrival and dismissal times. Visitor access will be restricted to the main entrance – all guests must present proper identification and comply with all ‘guest pass’ procedures before being allowed to pass beyond the main entrance. All staff will be required to wear photo ID badges while on school premises. Guest sign-in procedures will be established.

While SMS has not yet determined a final site, the Board is keeping the following safety and access features in choosing an appropriate site:

- Entrances that have double doors, which open out and operate with panic bar latches
- Doors that lock automatically upon closing
- A security camera at the front and back entrances
- A closed-circuit TV access door with coded alarm system
- A fully inspected, functioning fire alarm system that is linked in with the alarm system
- Fire escapes on every floor of the building, extinguishers in appropriate places
- Properly functioning sprinkler system

Phone/Texting Notification System

SMS will use an automated school notification system or similar to improve communications between the school and home and to provide important safety notifications to parents and guardians. This system for communication will provide notifications about school closings, delays, early dismissals, emergency notifications, attendance calls, bus route notifications, lockdown communications, activity reminders, lunch balance reminders, and parent polls and surveys.

Background Checks

All employees, contracted service providers, and volunteers (as required by law) will be required to complete a criminal background check (CBC). In addition, the Child Abuse Registry (CAR) will be checked through Department of Services for Children, Youth and Families (DSCYF). Both the CAR and CBC will be required of all new board members and submitted to the DDOE Charter Office within 45 days of election to the board. The school leader, with support from the Business Manager, will maintain due diligence in following the regulations for CBC's and CAR's for volunteers. Results will be maintained in a secure file, separate from personnel files; and, available for authorized inspection. The School Leader will be directly responsible for ensuring that criminal background and child abuse registry checks are initiated, completed and appropriately documented prior to an individual staff member's employment or board member's appointment.

c. Comprehensive School Safety Plan (CSSP)

Following the hiring of the school leader, the leader will reach out to DSHS to begin the Plan's development. In accordance with the Omnibus School Safety Act, the school leader will establish a School Safety Committee to work with the Department of Safety and Homeland Security (DSHS) to develop and maintain a comprehensive site-specific safety and emergency preparedness plan in compliance with the national Incident Management System (NIMS). The plan will address the situations with the potential to cause injury, loss of life damage to or destruction of property, or major disruptions of activities including weather events, crime or terrorism related events.

In addition, the school will work with the Department to conduct at least 1 critical incident or emergency event exercise each year and at least 1 tabletop exercise every 2 years. The

performance of these exercises will be reviewed by the SMS Safety Committee and the DSHS representatives and any necessary adjustments will be made to the plan.

6. **Lunch/Breakfast.** Describe the plan for providing meals to students, including homeless students and others students eligible for free or reduced-price meals. If the school plans to contract for meals, identify the contractor, if known, and describe the services to be provided.

(Note! Passed In 2013, 14 Del. C. §506(f) states that if a child would qualify for a no- or low-cost breakfast or lunch under a federal national school breakfast or lunch program, then the charter school shall provide breakfast and lunch to the child at no or low cost to the child's family, beginning in the 2014-2015 school year. Charter schools shall not consider whether a child would qualify for no- or low-cost breakfast or lunch under a federal national school breakfast or lunch program when making enrollment decisions.)

SMS plans to participate in the National School Breakfast/ Lunch Program, and will contract for meals from a qualified food service vendor. This contract will be established and monitored by the business manager. Because we intend to market for enrollment to families in Western Sussex County, we can expect that we will have the required percentage to participate in the universal free and reduced lunch program. This decision will be made when enrollment has been established each year.

Meals will be provided to all students, including those eligible for free/reduced easily and students who are homeless. Eligibility for free/reduced meals will be determined annually during the first week of school and in accordance with established state and federal procedures. This process will be managed by the business manager.

Montessori children often eat in the classroom community rather than in a common cafeteria. If our final site does not allow for a cafeteria; the teachers and children will have breakfast and lunch delivered to the classrooms.

While there are many components to be addressed, SMS will adhere to the following:

- The school nurse will work with the food service vendor to ensure that all meals are consistent with state and federal guidelines and compliant with USDA regulations.
- The contractor will have experience and knowledge to comply with the Federal requirements outlined in the Federal nutrition guidelines including, but not limited to providing food that is sodium and cholesterol reduced, limiting the percent of calories from total fat to 30 percent of the actual number of calories offered; limiting the percent of calories from saturated fat to less than 10 percent of the actual number of calories offered; and increasing the levels of dietary fiber.
- The School Leader will ensure that any contracts with food service providers contain a statement to the effect that the "School Food Authority and participating schools under its jurisdiction, shall comply with all provisions of 7 CFR parts 210 and 245."
- Lunches will be priced as a unit.

- All children who are determined to be eligible for such meals will be served lunches free or at a reduced price.
- SMS will claim reimbursement at the assigned rates only for reimbursable free, reduced price and paid lunches served to eligible children.
- The cafeteria manager or any contracted meal provider shall be responsible for reviewing and analyzing meal counts to ensure accuracy as specified in §210.8 governing claims for reimbursement.
- The number of free, reduced price and paid reimbursable meals served to eligible children will be counted at the point of service.
- SMS will make no discrimination against any child because of his or her eligibility for free or reduced-price meals in accordance with the approved Free and Reduced-Price Policy Statement.
- Proper sanitation and health standards will be followed in the storage, preparation and service of food.

7. Student Health Services. Describe the plan to ensure the health of students. Describe how the school will provide health services to all students, including the plan to hire a School Nurse and a description of his/her role in the school. The response must include how the school will promote student health and well-being. The response must also include who at the school will supervise the School Nurse and his/her role in ensuring compliance with health regulations.

Describe the plan to ensure the health of students.

General promotion of student health and well-being.

Assuring a safe and healthy environment for students and staff will be of the highest importance. The basic premises of Montessori Schools include respect for self, others, and the environment. The curriculum outlined in section 1.3 focuses on these three basic areas of respect teaching students to understand that there are healthy choices for themselves and others. This understanding is the foundation for every day conversations about student physical and emotional health and well-being in Montessori schools.

In addition to the creation of the Health and Safety Manual referred to earlier, SMS recognizes that there are basic procedures that need to be followed to maintain a healthy school community. Specifically, vigilant hand washing will be a primary focus as SMS is aware that hand-washing is the best-known tactic for preventing illness and stopping the spread of germs. Students are asked and continually reminded to wash hands, the list below outlines the time/frequency of hand-washing:

- After using the restroom
- In the morning before school starts (part of morning drop-off)
- Before and after eating (snack and lunch)
- After recess

Additionally, children who are sick will be required to stay home from school. Children must be fever free (without the use of a fever-reducer) for twenty-four hours before returning to school. Any child who becomes ill at school (with a fever) will be sent home.

SMS Board of Directors recognizes that medical issues, best practices and recommendations change as technology and diseases progress. When new health issues arise, SMS's policy will be to seek the current recommendations from the Center for Disease Control as well as the Delaware DOE and implement procedures accordingly.

SMS staff will be required to have first aid and CPR training. A mandatory review course will be offered during the in-service week prior to school opening in September. Staff will be trained in procedures to ensure children's safety should the school nurse not be available when there is a health-related issue.

Describe how the school will provide health services to all students, including the plan to hire a School Nurse and a description of his/her role in the school.

SMS will hire a registered nurse, preferably with experience in pediatric nursing, in July prior to the school opening who will be responsible for operating under the requirements issued by the Delaware Department of Education (DDOE). The nurse will report to the school leader. will maintain diligence in communications to parents, staff and students about urgent health issues, and will be responsible for complying with the policies and procedures in the Nursing Technical Assistance manual.

Specific responsibilities for the nurse will include enforcing policies established by the board. These policies will at a minimum address:

a) Ensuring that students and staff have physical examinations, immunizations, and TB screenings prior to enrollment or starting work;

Proof of a student's recent physical examination and immunizations will be collected at the time of enrollment. In accordance with state regulations, parents will be notified when immunization and other screening requirements are not met, and the student will be excluded from school until the regulation has been met. Properly documented immunization exemptions will be considered by the school leader in consultation with the school nurse.

b) Monitoring student health and maintaining health records;

The school nurse will monitor and maintain student health records in a secure location and forward the required documentation of services to DDOE.

c) Establishing procedures for administering medications and medical treatments, including first aid at school;

The school nurse will administer medications and medical treatments in accordance with DDOE's *Nursing Technical Assistance Manual and Regulations*, and any other appropriate governmental regulations or professional guidelines when students are onsite at school.

d) Ensuring the school nurse will serve on IEP teams, as required, when medical treatment is necessary;

The nurse will serve as a member of IEP teams when medical issues are discussed. The nurse will also provide medical information during evaluation processes.

e) Screening for health problems (vision, hearing, orthopedic, etc.);

The school nurse will conduct an active screening program for vision, hearing, orthopedic issues, etc. as prescribed in DDOE's *Nursing Technical Assistance Manual and Regulations*.

f) Establishing procedures for containing/controlling the spread of infectious diseases; and, Procedures will be developed to communicate appropriate precautionary steps for containing and preventing the spread of infectious diseases and other medical conditions.

g) Ensuring emergency response procedures and training.

Please see the section above about the Comprehensive School Safety plan.

These Board-approved policies will be incorporated, as appropriate, into the schools' parent, student, and staff handbooks as they are developed and will be reviewed on an ongoing basis. Appropriate staff training will be held as part of orientation programs.

8. **Insurance Coverage.** Provide, as **Attachment 18**, a list of the types of insurance coverage that the school will secure, including a description of the levels of coverage in accordance with 14 *Del. C. § 512(10)*. Types of insurance should include, without limitation, workers' compensation, liability, property, indemnity, directors and officers, automobile, and other. The Applicant should contact the Insurance Coverage Office at (302) 739-3651 or 877-277-4185 for further information on liability protection for public schools in Delaware.

Please see Attachment 18

9. **Student Records.** Describe the plan for the timely transfer of student and school data and records to the Department of Education, pursuant to 14 *Del. C. § 512(13)*. (**Note!** eSchool is the electronic system the State uses to enter and count students.)

SMS will be part of the state's eSchoolPlus pupil accounting system. The use of this system will ensure the timely transfer of student data and records to other schools and the DDOE. All staff members required to use eSchoolPlus will be fully trained on the system. SMS staff will participate in training prior to the opening of the school and remain current with staff training and data requirements defined by the DDOE.

1.9 Facilities

14 *Del. C. § 512(8) and (12)*

1. **Discuss the school's facility needs based on the educational program and projected enrollment. Discuss both short-term and long-term facility plans. Demonstrate that the estimate included in your budget is reasonable.**

At the time of this application, the board of the Sussex Montessori School (SMS) is assessing appropriate sites for the location of the school. Health and safety considerations, along with school size facility calculations for 455 students, are being incorporated into the search. The specifications used to evaluate appropriate sites include:

- Sites that support the Montessori philosophy that learning extends beyond the school community, incorporates natural environments, and supports interactions with the community including intergenerational and service opportunities.
- Classrooms that accommodate the activity of a Montessori Environment with square footage of approximately 1000 square feet.
- Space to bring the school community together for school wide events and programs.
- 15000 square feet under roof for the first year of the elementary school, with an additional 7,500 square feet in Year 2;
- Subsequent expansion for up to 455 students by year 4;
- Adequate parking and travel space (based on Sussex County Zoning Code) to accommodate student drop-off and pick-up logistics as well as faculty, staff, student and parent parking.
- Access from major arterial roadways to facilitate student transportation and safety.
- The improvement needs of the final facility, the ability to engineer health, fire, and safety systems per state, county, and city codes, as well as to implement storm water management upgrades and modern environmental building systems to create a low-energy-consuming and highly sustainable complex for the future.

During the planning phase for any of the three sites being considered, the board will work with a local architect to prepare preliminary designs for the following:

- 10 classrooms (1000 square feet each)
- Multipurpose spaces to accommodate art/music, library, other large assemblies, and possibly cafeteria space.
- 5-6 offices
- 1 reception area with secure access to classrooms

2. **If the applicants have identified a facility, state where the school will be located (including county location and any other location specifics) and, as Attachment 18, provide floor plans of the school that identifies each room and whether the building will be new construction or an existing building. Include a detailed description of the facility that includes the number of acres.**

It is anticipated that Sussex Montessori School will be located in the corridor between Georgetown and Seaford and will be acquired through lease or purchase once the school charter has been approved. The board has identified three locations in Sussex County which have sufficient geographic representation and available space and land (see 2b below). The Board has not entered into a contract with a site and will not do so until the charter application is approved.

- a. **If the site has been identified, list the detailed terms and/or conditions for the use of the facility. If not, describe the plans to identify a suitable facility.**

Montessori Works has secured funding from the Longwood Foundation (letter in attachments) to engage Mark Chura with Horizon Philanthropic in Sussex County to identify sites, assist in securing financing for the site, and to manage any renovations or construction needed for a site. This work began as of December 2017 and will continue during the charter application review process in the winter/spring of 2018. It is anticipated that upon approval of the charter for Sussex Montessori School, site number 1 below will be ready to have a contract for lease. If this site does not materialize, then the details to acquire site number 2 will be completed by July 2018. Finally, conversations and a letter of interest have been obtained for site 3 which could be a temporary site for the school for the first 3 years of operation.

If none of the above sites materialize, SMS will continue to work with Mr. Chura to identify a facility prior to January 1, 2019 and will ensure that the facility is in full compliance with all applicable codes and regulations prior to the opening of the school. Construction on the facility will be completed no later than late spring of 2019 so that a Certificate of Occupancy (CO) can be obtained by the deadline of June 15, 2019 in accordance with Delaware charter school law.

SMS understands that it would need to apply for an extension to the charter application by December, 2018 if a site is not secured to open in fall 2019. However, we expect that one of the three sites we have identified will become the site for the school.

- b. **If a facility has not been identified, specify potential locations that are under consideration, and discuss the process and timeline for selecting, acquiring, renovating (if appropriate), and taking occupancy of a suitable facility.**

- 1) **Site 1:**

This is the preferred site for the school. It is located on a publicly managed 750-acre campus roughly halfway between Georgetown and Millsboro just off Route 113. The location is close to Sussex Central High School, a day care facility and other buildings serving public needs. The campus is well maintained, with the central area containing structures surrounded by mature woods. All utilities are present, with electrical service provided underground. The existing road network provides easy access to the site. The campus also includes a 307 acres nature preserve. The site has a long history of public use, dating back to 1921. A recent master planning effort established strong community support for adaptive reuse of unused structures consistent with past public use of the site, and better utilization of the recreational assets within the campus.

Site number 1 consists of a 30,000-square foot complex of four single story brick buildings built in the 1960’s. It has been vacated now for several years. A central building of approximately 7500 square feet was constructed with a large cafeteria and central gathering space at its center, and offices ringing the perimeter. An additional three 7500 square foot buildings surround the central building. Each building is easily readapted for five classrooms and associated support facilities. A footprint remains a fifth 7500 square foot building that was part of the original complex but demolished a few years back.

The central building is in excellent condition and will require modest modifications to meet the needs of the new school. The remaining buildings are all structurally sound, but floor plans will need to be reconfigured and updated to meet required classroom needs. These buildings are currently being remediated for asbestos by the State.

All buildings are within close proximity of each other, ADA accessible and connected with a series of concrete sidewalks. The complex is approximately 20 acres surrounded by a road network providing easy building access and appropriate drop off space for buses. Existing electric, water and sewer at the complex appear adequate to meet future school needs.

The Site includes an adjacent building that originally served the complex as a gymnasium, and provided additional classroom space. The building was completely renovated within the last five years. This building is managed by the State, and could potentially be used in partnership with the new school to provide indoor recreation space and classroom capacity in its early years.

Funds secured from the Longwood Foundation will support site improvements (letter in attachments).

The timeline for securing this site is illustrated in the table below:

Engage in negotiations on school site #1 while charter approval process is happening	December 2017 – June 2018
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Cost estimates for major items for repurposing site completed	March 2018
Develop details and conditions of a 30-year lease with options on site number 1	Spring 2018
Sign lease for preferred site	June 2018
Begin repurposing construction work	June 2018 – June 2019
Occupy site	June 2019

Site 2:

Site 2 is non-developed land centrally located in Georgetown, close to the existing DTCC campus. Travel there would be easy for buses and students as roads are already in place to accommodate them. In addition, water and sewer connections exist close by allowing for us to potentially tap into those services at a relatively low cost. Additional unimproved acreage surrounds the property and would allow for future expansion if still available at a later date. This property provides an opportunity to create gardens and a campus in a natural setting, which is ideal for a Montessori school. Training and development for teachers would easily be facilitated through DTCC campus (with their permission) which offers existing resources in close proximity and already in place. We also feel this location benefits those students on the western side of the county (a target audience) as it is between routes 113 and 13.

The school would purchase approximately 15 acres of land. SMS would begin with modular units on this site adding units as the school expands. The school would begin a capital campaign for permanent construction after it is fully enrolled in year 3. Modular units would be purchased through financing. Funds secured from the Longwood Foundation will support site improvements, water/sewer and installation costs (letter in attachments).

The timeline for securing this site is illustrated in the table below:

Engage in negotiations on Site #2 if site #1 is not an option	January – June 2018
Parcels of land identified as back-up sites will be explored for regulatory requirements, construction costs, etc.	January – March 2018
Negotiations for property	May 2018
Settlement on property	July 2018
Completion of modular and occupancy	July 2019

Site 3:

This site is located further north in Sussex County but is still accessible to county residents. It is a repurposing of a facility that is part of a larger group of buildings being developed by Nationwide Health Care Services. This 22 acre site is being repurposed as an innovative, health-focused multi-use community. The available building has been targeted for educational purposes. While this building does not allow for anticipated expansion of the school, it is a solid site for the first years of the school should either of the sites above not

materialize. Conversations have been held with the representatives of Nationwide Healthcare Services and Sussex Montessori School has obtained a letter of interest from them to engage in discussions for a lease agreement. It is anticipated that negotiations for this site would begin if the other sites do not become viable options; May/June 2018.

c. Explain how the facility will meet the needs of students. Provide an assurance that it will be accessible to students with physical disabilities.

SMS seeks to enroll a diverse student body including students with physical disabilities. Prior to construction, the board, in conjunction with their construction management firm, will ensure the facility is compliant with the most up-to-date ADA regulations.

d. To the extent that the Applicant has discussed or established specific lease or purchase terms, include the proposed terms and any draft agreements. Ensure that all costs are included in the budget.

As a working estimate for occupancy costs, the school has budgeted \$850,000 for down payments, site preparation, and permitting. The overall cost for the preferred site number 1 is expected to be \$2,362,500 for three 7,500 square foot facilities at \$105 per square foot. SMS has not engaged in any specific lease agreements or purchase terms and will wait until the charter is approved to do so. However, the foundation has been established to ensure adequate funding for any of the sites in consideration.

- Sussex Montessori School has secured a letter of support from the Longwood Foundation committing to funding of \$350,000 at the time of charter approval, in support of request for \$500,000 in the spring of 2018. In addition, the Longwood Foundation is willing to consider a request in the spring of 2020. (Letter in attachments)
- The school has engaged in discussion with NCALL to provide financing for the school and to work with SMS to secure a USDA grant if appropriate. (Letter of Interest in attachments)
- Finally, SMS will partner with Horizon Philanthropic to secure funding from the local Sussex community. Horizon has a successful reputation for supporting non-profit efforts in Sussex County. Development of this campaign will begin in January 2018 with funding secured from the Longwood Foundation by Montessori Works for the gap until the charter is approved. (Letter in attachments)

1.10 Budget and Finance

14 Del. C. §§ 512(8)-(9)

(Note! There is no limit to the length of the Budget Narrative. Include it as a separate document.)

1. **Revenue Estimates. Complete and submit the “New Charter School Estimated State and Local Fund Calculations” spreadsheets as Attachment 20. The revenue estimate spreadsheet and budget worksheets are available at the following links:**

[Revenue Estimates](#)

[Budget Projection Sheets](#)

(Note! Revenue estimate spreadsheets should be completed for each year of operation if anticipated enrollment changes from one year to the next. Please be sure to include copies of both the “Data Entry Page (local detail)” tab AND the “State Detail Page” tab.)

Please see **Attachment 20** for the complete Estimated State and Local Fund Calculations.

Revenue estimates based on 100% of the targeted enrollment of 260 students.

Revenue Estimates based on 80% of the targeted enrollment of 208 students.

2. **Budget Sheets. Complete and submit the “Charter School Application - Budget Worksheets” as Attachment 17 (see link above). The Budget Sheets must include separate tabs for State & Local funds, and any other grant/foundation/donation funds. Applicants are not required to submit a Federal funds budget. Please note that the State and Local revenue figures on the Budget Sheets must match the figures calculated on the revenue estimates spreadsheet (Attachment 15). Applicants must submit two budgets with justification as to how the figures were derived:**
 - a. **A budget based on the targeted enrollment; and**
 - b. **A budget based on 80% of the targeted enrollment.**

Please see Attachment 17:

Budget based on 100% of the targeted enrollment of 260 students.

Budget based on 80% of the targeted enrollment of 208 students.

3. **Budget Narrative (Provide as Attachment 21)**
Provide a detailed Budget Narrative that clearly describes assumptions and revenue estimates, including but not limited to the basis for Per-Pupil Revenue projections, staffing levels, and costs.

All figures contained in the budget worksheets should be clearly identified and explained in the Budget Narrative. The Budget Narrative must provide details on how each number on the Budget Sheet was estimated. A separate Budget Narrative for the five-year contingency budget based on 80% of targeted enrollment is also required.

Please see Attachment 21 - Budget Narrative for 100% and 80% enrollment

4. **Business Plan (Provide as Attachment 22)**
Please see Attachment 22 – Business Plan

- a. **Expected Funding Sources.** Indicate the amount and sources of funds, property, or other resources expected to be available through banks, lending institutions, corporations, foundations, grants, etc. Note which are secured and which are anticipated, and include evidence of firm commitments, where applicable. Describe the school’s contingency plan to meet financial needs if anticipated revenues are not received or are lower than the estimated budget.

Sussex Montessori School will be deriving its revenue from the following sources:

- state and local appropriations based on a unit count scenario;
- federal funds for mandated programs, such as Title I, Title III, and Free and Reduced Lunch programs;
- private donations, foundation giving, and grants (letters attachment 15)
- Financing is expected to be secured with assistance from NCALL (letter attachment 15)

For details regarding these funding sources, please see Attachment 22 – Business Plan

- b. **Operations Overview.** Describe the systems and processes by which the school will manage accounting, purchasing, payroll, and audits, pursuant to 14 Del. C. § 512(8) and (9). Specify any administrative services expected to be contracted for the school, and describe the criteria and procedures for the selection of contractors. Provide details on how financial, personnel, and administrative support will be provided to the charter school and how internal controls will be maintained.

Financial operations, including payroll and accounts payable for Sussex Montessori School, will be under the direction of the School Leader, with the assistance of the Treasurer of the Operating Board. The school will also be supported by an independent financial services contractor, who will assist with the financial accounting, reporting, compliance and budgeting activities.

For details regarding operations related to accounting, purchasing, payroll, and audits, please see Attachment 22 – Business Plan

- c. **Depositing Funds.** Describe the process by which funds will be deposited into the school’s state account. If a state account is not used, describe where the funds will be deposited to ensure that all school funds are available for audit by the State Auditor’s Office upon request.

All funds not directly uploaded into the school’s FSF appropriations or delivered via Inter-Governmental Voucher will be deposited in person to the state account at a Citizens Bank office by a member of the school staff.

- d. **Audits.** Describe the financial controls that the school will have in place, including the annual audit of the financial and administrative operations of the school. Include evidence that the school will adhere to the accounting, auditing, and reporting procedures and requirements that apply to public schools operating in Delaware in accordance with the [State Budget and Accounting Manual](#) and 29 Del. C. Ch. 69.

Please see Attachment 22 – Business Plan

- e. **School closure, non-renewal, or dissolution.** Describe the plan and procedures that the school will follow in the event of the closure, non-renewal, or dissolution of the school. Also, the applicant is to put forth a reasonable plan to establish sufficient available balances pursuant to 14 *Del. C.* § 515(k) below.

§ 515. Oversight and revocation process.

(k) In the event that all state and local funds due to a charter school are paid timely as required by 14 *Del. C.* § 509, a charter school authorized to operate in the State must by December 31 of that fiscal year maintain an available balance sufficient to pay the minimum costs necessary to provide students with the minimum annual instructional hours required by the Department of Education during the remainder of that fiscal year as reasonably projected by the charter school. Such costs include, but are not limited to, all employee compensation required to attain the minimum annual instructional hours during the remainder of that fiscal year. Such costs also include all fixed and variable non-payroll expenditures incurred through the final month of that school year. A school's failure to maintain sufficient available funds by December 31 of its third year of operation shall be deemed a material violation of its charter.

Please see Attachment 22 – Business Plan