

CHARTER APPLICATION FOR THE

# **Saint Augustine Public Montessori School**

PRESENTED TO THE

**SAINT JOHNS COUNTY SCHOOL DISTRICT**

*40 Orange Street  
St. Augustine, FL 32084*

PRESENTED BY THE

**SAINT AUGUSTINE MONTESSORI COMMUNITY**

*268 Saint George Street  
Saint Augustine, FL 32084*

AUGUST 2011

## APPLICATION COVER SHEET

NAME OF PROPOSED CHARTER SCHOOL: \_\_\_\_\_

NAME OF NONPROFIT ORGANIZATION/MUNICIPALITY UNDER WHICH CHARTER WILL  
BE ORGANIZED OR OPERATED: \_\_\_\_\_

The Organization has applied for 501(c)(3) Non-profit Status: Yes \_\_\_\_\_ No \_\_\_\_\_

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

NAME OF CONTACT PERSON: \_\_\_\_\_

TITLE/RELATIONSHIP TO NONPROFIT: \_\_\_\_\_

MAILING ADDRESS: \_\_\_\_\_

PRIMARY TELEPHONE: ( ) \_\_\_\_\_ ALTERNATE TELEPHONE: ( ) \_\_\_\_\_

E-MAIL ADDRESS: \_\_\_\_\_

NAME OF EDUCATION SERVICE PROVIDER (if any): \_\_\_\_\_

NAME OF PARTNER/PARENT ORGANIZATION (if any): \_\_\_\_\_

Projected School Opening: \_\_\_\_\_

School Year	Grade Levels	Total Projected Student Enrollment	Student Enrollment Capacity (if known)
First Year			
Second Year			
Third Year			
Fourth Year			
Fifth Year			

I certify that I have the authority to submit this application and that all information contained herein is complete and accurate, realizing that any misrepresentation could result in disqualification from the application process or revocation after award. I understand that incomplete applications will not be considered. The person named as the contact person for the application is so authorized to serve as the primary contact for this application on behalf of the applicant.

\_\_\_\_\_  
*Signature*

\_\_\_\_\_  
*Title*

\_\_\_\_\_  
*Printed Name*

\_\_\_\_\_  
*Date*

## CHARTER APPLICATION FOR THE SAINT AUGUSTINE PUBLIC MONTESSORI SCHOOL

### **Executive Summary**

Saint Augustine Montessori Community, Inc. (SAMC), a registered, not-for-profit [§ 501(c)(3)] organization, was established to create and to sustain a charter school in St. Augustine, Florida. SAMC is now seeking this charter and the financial assistance to establish Saint Augustine Public Montessori School (SAPMS). SAMC intends for this school to offer the first no-fee Montessori educational program in St. Johns County to those who choose it as an alternative educational method. The organizers believe that SAPMS will complement the excellent St. Johns County public school program by adding the time-tested Montessori Method of education as a viable public education option.

The mission of SAPMS is to provide students in Grades 1 through 6 (ages 6-12) with a learning culture that is grounded in Montessori philosophy. This historically proven educational model supports the whole child, creates lifelong learners, and educates for collaborative approaches to community leadership. The foundation for such academic excellence is a prepared classroom environment that inspires self-paced, individualized discovery, a love of learning, and respect for self, others, and the environment. Through a Montessori education, the School will offer a nurturing environment to economically and culturally diverse families in the area.

### **Background and Governance**

In November 2010, a group of parents with legal, business, non-profit administration, and community advocacy experience met with local Montessori educators to discuss an increasing need for Montessori elementary education in the Saint Augustine area. In 2011, this group formed the Founding Board of the SAMC. SAMC is committed to creating a Montessori public school option for all interested families, including those who do not have the means to consider private Montessori education.

Parents of preschoolers through second-graders affirmed the benefits their children experienced from the Montessori environment. More than 400 public schools nationwide offer Montessori programs, including 25 in Florida. SAMC has confirmed substantial interest of parents in the area who want their child to attend SAPMS through e-mail surveys and social media. Additionally, the public Montessori schools in Jacksonville maintain a waiting list with over 100 students. Parents from Moultrie Montessori School in St. Augustine as well from other private preschool-age (primary) Montessori schools in surrounding counties that currently serve St. Johns County residents, are also interested in SAPMS. These are anticipated to be feeder schools for SAPMS (see Section II.13.A on page 73).

The current work of the SAMC Board of Trustees (the Board) has been to prepare the charter school application and serve as an ambassador-organization in promoting the School. Following approval of the charter, the Board will establish the School, govern SAPMS, be the guardian of its mission, monitor its health and viability, and advocate for the School and its students (see Section II.9 on page 56).

### **About the Montessori Method**

The Montessori Method nurtures the academic side of child development as well as the "whole child" (intellectual, cognitive, social, emotional, and spiritual aspects). Children learn the values of compassion and empathy, service, integrity, self-reliance, and tolerance. In such an atmosphere, children learn to become peaceful and tolerant members of society who wish to succeed by bringing others along.

SAPMS will incorporate the following elements of the Montessori experience into its curriculum:

1. Multi-age classrooms that are divided into three-year spans (Grades 1-3 and 4-6) based on developmental windows, creating a dynamic group of multi-aged children who stimulate and support one another in their development and learning.
2. A prepared environment consisting of specific, hands-on, sequential materials and curriculum created by Dr. Maria Montessori and other trained Montessori educators.
3. Work periods where children are allowed to select work of their own interest and concentrate on it for up to 3 hours in as much depth as they desire with minimal guidance from a teacher.
4. A focus on cooperation rather than competition.
5. Holistic education and integrated instruction, whereby all-encompassing lessons that unite all curriculum subjects are presented to provide a universal syllabus from which the children can find meaning and connections in core subjects as well as with languages, art, music, and physical education.
6. Montessori-trained teachers.
7. The active involvement of children, parents, and community members and organizations in learning opportunities, both inside and outside of the school building, and in partnerships with the school.

Because independent and group research is a strong component of the Montessori approach, the community is an extension of the classroom, and children are active in seeking information from resources outside the school that enhance their knowledge in a given area of study. This idea of the community as an extension of the classroom is executed in the Montessori curriculum as occasions (enhanced field trips) referred to as *Going Out*.

SAPMS's elementary program includes ten key curricular areas: Language Arts, Mathematics and Geometry, Geography, Earth and Physical Science, Biology, History/Social Science, the Arts (Visual Arts, Music, Drama, Movement), Character and Peace Education (Service Learning), Practical Life, and Health and Physical Education. The core academic subjects are initially introduced through the Five Great Lessons, which provide an overarching and integrating framework. SAPMS's curriculum is designed to address the psychological characteristics of children in the second plane of development, which include a stronger capability of effort and concentration, an immense desire for knowledge, a stronger need to satisfy intellectual curiosity, development of the powers of imagination, and heightened social exploration.

The elementary program at the SAPMS will offer the following:

- Presentation of the formal scientific language of zoology, botany, anthropology, geography, geology, etc., exposing the child to accurate, organized information.
- The use of timelines, pictures, charts, and other visual aids to provide a linguistic and visual overview of the first principles of each discipline.
- Presentation of knowledge as part of a large-scale narrative that unfolds the origins of the earth, life, human communities, and modern history, always in the context of the wholeness of life.
- A mathematics curriculum presented with practical, hands-on materials that simultaneously reveal arithmetic, geometric, and algebraic correlations.

- Emphasis on open-ended research, self-directed reading, and in-depth study using primary and secondary sources as well as other materials.

Please see Section I.4 (page 22) for a discussion of the Montessori curriculum, Appendix A for information on the 5 Great Lessons, and Section I.3.B (page 9) for more information about the Montessori elementary classroom.

## **Montessori Faculty**

The teacher serves as a facilitator and guide in the Montessori classroom and is responsible for the functioning of the learning environment and all aspects of its day-to-day operations. He or she works with the Director, and as necessary, the Board of Directors, the District, students, parents, community members. The job of the Montessori teacher is to follow each child's progress, to create an environment where materials are available to the students and presented when they are ready to progress, and to encourage children to complete each phase of their work. Montessori teachers are charged with meeting the students' physical, mental, and emotional needs, with designing individual and group learning opportunities, and with extensively documenting students' progress and activities. Ultimately, Montessori teachers support their students in ways that lead the children toward their own successes.

Our lead teachers will hold, at minimum, 4-year liberal arts degrees, and will have Montessori training. All SAPMS teachers will comply with the teaching requirements for Florida Charter Schools. They must understand and believe in the Montessori philosophy and materials and be familiar with individualized observation and record keeping. SAPMS teachers will be inquisitive, reflective, creative problem solvers who committed to the School's mission. Faculty plans are discussed further in Section II.10 (page 64).

## **Practical Application of the Montessori Method at SAPMS**

Academic work at SAPMS most often will be initiated by each individual student, with more directed instruction in reading and mathematics, or when materials or concepts are introduced. Because the subject matter will be highly integrated, time allotted for each subject will be in 3-hour uninterrupted blocks of work time available each day.

Each child will be guided to design their own work plan. This plan will be carried out under the guidance of the teacher to ensure that all Standards are addressed, to guide their general work, and to teach them to become responsible for their own time management and education. Children self-evaluate their learning and stretch to achieve their best effort. They regularly record progress in their work plans and periodically assess their progress through individual conferences and reviews with teachers.

The multi-age structure of the classroom allows students to learn from each other, and in turn, to teach. In such a system, age/grade level assumes less importance and each child masters a given concept as he or she is capable, at a pace that is comfortable for him or her.

Peer mediation is fostered in the Montessori elementary classroom. The children are coached on resolving interpersonal issues, guided by a teacher, according to Montessori principles and school policy. In this way, the classroom becomes a self-managing community. The children order, organize, and manage the daily operations of their environment. The character and integrity children develop by educating themselves and one another and by confronting their own issues in the classroom will empower them as adults.

Upon graduating from the SAPMS, each student will have the following:

- A clearly demonstrated set of academic skills.

- Experience in community service.
- An awareness of their rights and responsibilities as citizens.
- Knowledge of learning styles and ability and the curiosity to follow their academic interest and ability to follow it through.

Follow-up studies of Montessori elementary graduates have indicated that most have excellent integration into traditional educational environments, with many excelling academically as well as socially. Montessori graduates are usually very good problem solvers and work beyond set limits to gain complete knowledge of a subject. They seek real understanding and study because they love to learn. Montessori graduates are able to combine industry and creativity, and the Montessori training inspires children to believe that they can make a positive difference in their communities and the world.

For additional information about details of the target student population, please see Section I.2. Educational program design is discussed in Section I.3 (page 8), while an overview of research that supports the efficacy of the Montessori Method is presented in Section I.3.C (page 16). Details of student assessment are presented in Section 1.5 (page 42), and the Montessori curriculum is discussed in Section I.4 (page 22).

## **Complying with State and Federal Standards**

SAPMS is committed to working with members of the St. Johns County School District (SJCS D) and to participating in the required Florida Statewide Assessment program, including the components of the Florida Comprehensive Assessment Test (FCAT) and any changes or additions made during the contract period.

SAPMS is fortunate to have two educators with expertise in correlating the Montessori curriculum with State and Federal standards. SAPMS will use this in-house expertise as well as information from other schools to develop a system of evaluation which will be aligned with the Next Generation Sunshine State Standards and the Common Core standards when those are adopted.

SAPMS will use a process of reporting student progress that is compatible with Montessori and includes parent conferences and authentic assessment tools such as observation, portfolio, and performance assessment with rubric, etc. At the same time, SAPMS will implement the State-mandated assessments in such a way that the character of the Montessori program is not compromised.

SAPMS will seek accreditation with either the American Montessori Society (AMS) or the Association Montessori Internationale (AMI) and the North American Montessori Teachers' Association (NAMTA). These accreditation processes are comprehensive, require resources and will take several years to achieve. With these goals in mind, SAPMS will use the accreditation standards of these organizations in planning our assessment procedures.

## **Exceptional Students**

Montessori is a hands-on learning curriculum that has been proven successful with students who have difficulties learning, those who are average, and those who are above average. In this independent learning, the teacher can individualize the program to meet the needs of each student. This type of learning and curriculum, along with its possibilities for exploration, also provide gifted children many opportunities for growth.

Our model for exceptional student education (ESE) will be the inclusive model. The School's Individual Education Plan (IEP) team will meet to determine if a student's special needs can be met at SAPMS.

SAPMS will work with the guidance of the SJCS D to identify the special needs of our students and to meet all applicable federal, state, and local policies and procedures including the Individuals with Disabilities Education Act (IDEA), Section 504 of the Rehabilitation Act of 1973. The ESE plans for the school are described in Section I.6 on page 49.

### **Student Population: Enrollment Projections and Provisions**

The goals of SAPMS's admissions policy are 1) to attract, enroll, and retain the broadest spectrum of students and families representative of the diversity existing in the District and 2) to provide for classroom growth consistent with providing an authentic Montessori education. To maintain the Montessori philosophy in the classroom, SAPMS will limit the number of students who do not have previous Montessori and, if the number of applicants exceeds capacity, SAPMS will give enrollment preference to those children that have previous Montessori experience, with a desired ratio of four children with Montessori experience for every one child without Montessori experience.

The student:teacher ratio at SAPMS will be at or below 1:18 for Grades 1-3, and the ratio in Grades 4-6 will be at or below 1:22. The desired classroom size in an authentic Montessori classroom is from 25-30 students, with one experienced Montessori teacher and one Montessori teacher aide. This size classroom will be our eventual goal at SAPMS. A critical consideration is growing the classes at a rate that allows for a majority of the students to have previous Montessori education and allows minimal disruption to children remaining in the same classroom for the 3-year cycle. Our enrollment projections show starting the school with 52 students and growing to 132 students by the fifth year. For further discussion, please see Sections I.3.C (page 16) and II.13.C (page 75).

Families of eligible children must be willing to make an extraordinary commitment to their child's education. The Montessori school program is based on a cooperative learning that involves family and community spirit. Parental involvement is discussed further in Section II.13.D and II.13.E of the application (beginning on page 80).

### **Business Plan: Site Location and Facility Design**

SAPMS intends to locate a site after approval of the Charter Application. SAPMS is seeking a balance in choosing its physical location between the goals of a central location and a natural setting for outdoor play and education. The preferred location will be within the limits of the City of Saint Augustine. The desired site will be centrally located and near socioeconomically diverse areas so that a larger number of the targeted student population may be able to walk or bicycle to the school.

Startup and operating budgets and a plan for rigorous financial oversight are presented in Part III (beginning on page 82), along with a detailed plan for fundraising and the action plan, which is presented in timeline form. From the start of this project, we have understood the significant need for building a sustainable development plan that will include fundraising and the importance of crafting an effort that will garner support from families, community members, and businesses. We will seek support from local, state, and national foundations to assist with both startup and recurrent capital and operating costs.

### **Summary: Adding Montessori as a Public Education Choice**

A no-fee public Montessori elementary school is a desirable addition to the Saint Augustine community. Supporting families and community members (see Appendix F) request that SJCS D approve this charter application to establish SAPMS. Through our commitment to Saint Johns County and the State of Florida, we will create an economically sustainable, high-quality charter school. The SAPMS will bring Montessori public.

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## **Acronyms**

AMI	Association Montessori Internationale
AP	Advanced Placement
AMS	American Montessori Society
ESE	Exceptional Student Education
ESOL	English for Speakers of Other Languages
FCAT	Florida Comprehensive Assessment Test
IDEA	Individuals with Disabilities Education Act
IEP	Individual Education Plan
FAPE	Free appropriate public education
FERPA	Family Educational Right to Privacy Act
MACTE	Montessori Accreditation Committee for Teacher Education
NAMTA	North American Montessori Teachers' Association
OSHA	Occupational Safety and Health Administration
SAMC	Saint Augustine Montessori Community
SAPMS	Saint Augustine Public Montessori School
SJCSD	Saint Johns County School District

# Saint Augustine Public Montessori School

## I. Educational Plan

### I.1. Mission, Guiding Principles, and Purpose

#### **Evaluation Criteria:**

*Reviewers will look for:*

- *A compelling mission statement that defines the guiding principles and values of the school.*
- *A set of priorities that are meaningful, manageable and measurable, and focus on improving student outcomes.*

#### **I.1.A. Mission**

Our mission at Saint Augustine Public Montessori School (SAPMS) is to provide students in Grades 1 through 6 (ages 6-12) with a learning culture that is grounded in Montessori philosophy. This historically proven educational model supports the whole child, creates lifelong learners, and educates for collaborative approaches to community leadership. The foundation of this academic excellence is a prepared classroom environment that inspires self-paced, individualized discovery; a love of learning; and respect for self, others, and the environment. The following values are core to the Montessori philosophy:

- Exploration to satisfy innate curiosity: Children are encouraged to learn through physical exploration of their environment, repeating activities until achieving mastery. Teachers tailor the available activities according to the observed developmental needs of each child, with the result that each child remains focused and engaged in individual and group activities of high interest.
- Academic excellence: A prepared and rigorous Montessori academic environment allows children to be challenged at their own developmental level and experience the freedom to progress at their individual pace.
- Critical thinking for meeting shared community goals and collaborative problem-solving: The uncompromising respect for self, others, and the environment emphasized in the Montessori Method fosters lifelong commitment to society.
- Building personal competence: Reinforcing learning through an emphasis on inner discipline and encouragement to self-identify errors from the instructional materials promotes the development of confident, well-adjusted people ready to take their places as capable, informed leaders and meaningful contributors in an adult world.

The extent to which our core values are being met will be measured annually through parent, teacher, and student surveys and the other metrics discussed in **Section I.5. Student Performance, Assessment, and Evaluation** that begins on page 42. In addition, SAPMS expects that its students will meet the Saint Johns County School District (SJCS) averages for achievement on State testing. The Sunshine State Standards will be correlated to Montessori curriculum and materials. As new standards are established, they will be reviewed and taught in accordance with Montessori philosophy.

### **I.1.B. Compliance with State of Florida Charter School Principles [F.S. § 1002.33(2)(a)]**

Three specific principles are applied to this test in the Statute:

1. Meet high standards of student achievement while providing parents flexibility to choose among diverse educational opportunities within the state's public school system.

The main purpose of the proposed SAPMS is to provide a public Montessori elementary program in Saint Johns County. The School is intended to offer the first no-fee Montessori educational program to those who choose it as an alternative educational method. The organizers believe that the SAPMS will complement the excellent St. Johns County public school program by adding the time-tested Montessori Method of education as a viable public education option. The School will offer an authentic Montessori education and a nurturing environment to the economically and culturally diverse families in the area that choose this alternative approach to childhood education for their children.

2. Promote enhanced academic success and financial efficiency by aligning responsibility and accountability.

The School will promote enhanced academic success and financial efficiency by aligning responsibility with accountability, as specified in the applicable academic and finance sections set forth in this application (see pages 8, 22, and 83).

3. Provide parents with sufficient information on whether their child is reading at grade level and whether the child gains at least a year's worth of learning for every year spent in the charter school.

The School will provide parents with sufficient information on whether their child is reading at grade level and whether the child gains at least a year's worth of learning for every year spent at SAPMS. Regular progress updates will be provided to parents and guardians throughout each year, and parents and guardians will be aware of their child's work plan at the beginning of each year and shown progress on the work in the plan at a midpoint of each year. Mastery in a Montessori classroom is evaluated regularly by teachers as each individual child progresses. Some children do not truly achieve mastery, according to the Montessori Method, until they are able to teach the concept or skill to younger students in the 3-year classroom. The 3-year cycle allows for children to learn from one another and to work at their own pace. In addition, it may be that the order of teaching particular Montessori standards might not match up exactly from year to year with the Florida standards, but by the end of a 3-year cycle, all Florida standards will have been introduced, worked on, evaluated, and possibly mastered. The means for these measurements are specified in the assessment section of this application.

The School is being designed as a child-centered, community-oriented elementary public school rooted in the scientific teachings of Dr. Maria Montessori. A special emphasis on increasing the reading ability of our students will be based on a foundation of phonics, whole language, and comprehension through visualization. The children's sense of academic accomplishment and their parents' satisfaction in their children's educational development are the integral dual components of our organizational approach. Parental involvement in the school governance and curriculum will be actively encouraged and solicited as a necessary component of student scholastic performance.

### **I.1.C. and I.1.D. Meeting the Prescribed and Optional Purposes for Charter Schools [F.S. § 1002.33(2)(b) and § 1002.33(2)(c)]**

The prescribed and optional purposes found in Section 1002.33(2)(b) and (c) are also presented throughout this entire application.

The prescribed purposes of a charter school will be attained through an academic program that offers a uniquely prepared, individualized educational environment that promotes the development of students who are self-disciplined, cooperative, responsible, and creative thinkers of the greater community. The School adheres to the point of view that intelligence is not rare and that self-realization is the foundation for all future fulfillments. The core curriculum in the elementary Montessori program consists of language, mathematics, science, geography, history and culture, practical life, sensorial. The school will strive to instill a solid foundation in intellectual growth, and humanitarianism. As Montessori scholar Jean Miller (1974) states:

*The multi-age elementary classroom design aids the child in his own natural development which includes basic physical, emotional and cognitive skills necessary for functioning in his society and world and... helps him gain an overview of the development of the universe, the solar system, the earth, life on earth, early man, civilizations and scientific classification. This knowledge is an aid to his own natural inner development.*

The goals of the School are as follows:

- To prepare an elementary environment that incorporates hands-on, practical educational materials in a specified, orderly arrangement wherein the children can develop their unique capabilities and discover their full potential by allowing them to direct their own learning time and pace under the guidance of the teacher.
- To promote independence, responsibility and leadership as well as respect, cooperation, and community in a classroom spanning three grade levels.
- To facilitate a well-rounded, comprehensive curriculum that is consistent with the Sunshine State and Common Core Standards and that instills a sense of wonder about the universe and the child's place within that universe.
- To extend the classroom out into the community, creating a network of exchange among community members, family, and teachers.

The School is founded in the belief that all differences are to be respected and those that do not interfere with the rights of others and the learning environment will be accommodated. SAPMS is dedicated to teaching the core values of peace, integrity, community, and tolerance through a scientific and culturally oriented Montessori curriculum, thus revealing to the child the diversity and richness of human experience.

The primary focus of the School is on the individual student, providing children with spontaneous and creative opportunities as well as an organized curriculum. This combination will stimulate and encourage the self-discipline and responsibility necessary to become informed citizens and leaders. The School is also committed to providing a safe environment that is psychologically and emotionally nurturing and is conducive to learning.

Academically, children will be encouraged to move ahead in a challenging curriculum supported by ingenious and time-tested materials designed by Dr. Maria Montessori and other Montessori-trained

educators. The teacher guides students to the next level of difficulty within the parameters of the Individual child's interest and ability.

The School's teaching philosophy is based on the premise that excellence in education requires the following:

- An extraordinary commitment on the part of the family, school, and community members. The central focus is the belief that families are ultimately responsible for their child's growth and development.
- Teachers who keenly observe, diagnose, and prescribe for each learner a personalized education plan that is cooperatively developed and regularly evaluated by the teacher, parent, and child.
- A developmentally appropriate, experiential learning system that facilitates a sense of mastery and accomplishment.

The core philosophy of the school is the integration of family and cultural values into the governance and curriculum of the school. As discussed on page 2, we believe that parental involvement in education is the foundation for increased academic achievement of students.

Montessori teachers are trained to be acute observers who can "follow the child" to understand how best to tap their interests and talents. Through the use of this teaching method, combined with comprehensive, Sunshine State- and Common Core Standards-compliant Montessori materials and curriculum, children learn the basic foundations of reading, writing, and arithmetic at an early age.

This method nurtures the academic and cognitive aspects of child development as well as the "whole child" (intellectual, cognitive, social, emotional, and spiritual aspects). The social, emotional, and spiritual aspects of the child's education have to do with practicing the values of compassion and empathy, service, integrity, self-reliance, and tolerance. At SAPMS, adults model these core values. In such an atmosphere, the goal is to create peaceful, tolerant members of society who are encouraged to share learning with others.

We will provide a rigorous academic program characterized by individualization and high standards. Diverse teaching opportunities will be respected and encouraged. Creativity in designing unique approaches to instruction will be valued. Learning may occur with individual lessons, seminars, large and small group work and through the arts and science curriculum. The children's work and the curriculum may be measured individually by personalized work plans and through tools such as portfolios, which will provide assessment beyond that required through only the use of state and federal assessment tools.

Our goal is to work with each student to provide him or her with the necessary tools to be successful in school. Therefore, upon graduating from the school, each student will have the following:

- A clearly demonstrated set of academic skills.
- Experience in community service.
- An awareness of their rights and responsibilities as citizens.
- Knowledge of learning styles and ability and the curiosity to follow their academic interest and ability to follow it through.

Follow-up studies of Montessori Elementary graduates have indicated that most have excellent integration into traditional educational environments, with many excelling academically as well as socially. Montessori graduates are usually very good problem solvers and work beyond set limits to gain complete knowledge of a subject. They seek real understanding and study because they love to learn. Montessori graduates are able to combine industry and creativity, and the Montessori training inspires children to believe that they can make a positive difference in their communities and the world.

## I.2. Target Population and Student Body

### **Evaluation Criteria:**

*Reviewers will look for:*

- *An understanding of the students the charter school intends to serve.*
- *A manageable plan tied to enrollment projections that will allow the school to meet its constitutional class size obligations.*

### **I.2.A. Anticipated Student Population (F.S. §1002.33)**

SAPMS will serve children ages 6 through 12, in Grades 1 through 6 who reside in Saint Johns County. Our school will be non-sectarian in its programs, admission, and employment practices. SAPMS will not charge fees or tuition. SAPMS will not discriminate with regard to enrollment and will strive for a racial, ethnic, and socioeconomic balance and target recruiting efforts accordingly. Our application and enrollment process will be in accordance with our charter application unless altered by Florida law. The School's program is designed to attract and benefit students and parents who have an interest in the Montessori educational design. However, the School will communicate that students of all abilities, from those with learning disabilities to those who are gifted, can be equally successful in the Montessori environment.

The Montessori Method has been particularly successful in breaking down racial and economic barriers. Montessori schools appeal to parents who are familiar with the Montessori methodology, as well as to both higher and lower socio-economic status parents because they observe their children enjoying school, finding success, and sharing their raised self-esteem with their families.

Children with special needs will be afforded an equal enrollment opportunity, and their needs will be addressed on an individual basis as they apply. Each student's Individual Education Plan (IEP) and special services requirements will be review by the School's IEP team prior to enrollment. Our model for exceptional student education (ESE) students will be the inclusive model. The IEP team will meet to determine if students' special needs can be met at SAPMS or if they can be better served at another school. SAPMS staff will work together with District personnel to ensure that the needs of these children are met.

Because of the School's small size, we will not have any separate classrooms or extra assistants dedicated to special needs students. Therefore, such students must be able to be served in the same classroom as non-special needs students and be able to fit within the Montessori mode of teaching. Additional discussion of the SAPMS's approach to serving children with special needs is presented in **Section I.4.D. Exceptional Students and the Montessori Curriculum** on page 37.

The School will limit the number of students who do not have previous Montessori experience so that the Montessori Philosophy can be maintained. The School will attempt to keep a ratio of four children with Montessori experience for every one child without Montessori experience in each classroom. Montessori teachers have observed that having a higher percentage of new students without previous



Montessori experience in a class can make the class more difficult to “normalize,” according to Dr. Montessori’s definition of the term. This concept is discussed further in **Section II.13. Student Recruitment and Enrollment** on page 73.

The School will give enrollment preferences as follows:

- Children who are siblings of a student enrolled in the school.
- Children of a member of the governing board of the school.
- Children of a school employee.
- Children with continuous Montessori experience.
- Children with Montessori experience.
- All other children who complete the enrollment process on time.

### **I.2.B. Enrollment Projections**

Montessori classes are structured in 3-year spans, and the School will follow this guideline for student placement. Our projections indicate that, by the third year of operation, the School will serve first through sixth graders (6-12 years of age). However, to gradually build up the student population with Montessori experience, the older grades will be added as needed. In Year 1, we will start with two classes of mixed aged students, 6-9 years of age (Grades 1-3). We will add an additional grade each year until we have Grades 1 through 6, separated into early elementary (6-9 years of age) and upper elementary (9-12 years of age) classes. Our projections indicate that there will be a few fourth-grade students who will be allowed to continue their Montessori education in a 6-9 year-old classroom during the first year because there will not be enough students to constitute a full upper elementary class as of that time.

Since December 2010, we have been keeping an estimated count of children whose parents indicate they will apply for enrollment to the school. The projections in the table below are based on this estimated count. We feel this count is low due to the, thus far, minimal effort communicating with the community about the school and limited amount of publicity the school has received. By the time the school opens, we expect the interest to exceed the amount of available spots.

The student:teacher ratio at SAPMS will be at or below 1:18 for Grades 1-3, and the ratio in Grades 4-6 will be at or below 1:22. The desired classroom size in an authentic Montessori classroom is from 25-30 students, with one experienced Montessori teacher and one Montessori teacher aide. This size classroom will be our eventual goal at SAPMS. A critical consideration is growing the classes at a rate that allows for a majority of the students to have previous Montessori education and allows minimal disruption to children remaining in the same classroom for the 3-year cycle. Given these criteria, we propose the numbers estimated and described below. While the total numbers in these projections are realistic and likely to be accurate, the division among classrooms and grade levels will need to be evaluated and modified year-to-year to meet the above criteria, allow realistic budgeting, and provide flexibility in meeting classroom needs.

### SAPMS Enrollment Projections

	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6
	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018
<b>Students by Age</b>						
6 years old	18	20	22	24	26	26
7 years old	16	18	20	22	24	26
8 years old	14	16	18	20	22	24
9 years old	4	16	18	20	22	22
10 years old	0	6	16	18	20	24
11 years old	0	0	6	16	18	20
Students 6-9 years old	48	54	60	66	72	76
Students 9-12 years old	4	22	40	54	60	66
<b>Students Total</b>	<b>52</b>	<b>76</b>	<b>100</b>	<b>120</b>	<b>132</b>	<b>142</b>
Director/Principal				1	1	1
Director/Teacher	1	1	1			
Teachers 6 to 9	1	1	1	3	3	3
Teachers 9 to 12	0	1	2	2	2	3
<b>Teachers Total</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>5</b>	<b>6</b>
Assistants 6 to 9	2	2	2	3	3	3
Assistants 9 to 12	0	1	2	2	2	3
<b>Assistants Total</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>5</b>	<b>6</b>
<b>Classrooms Total</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>5</b>	<b>6</b>

Once the primary school grades have been established, the SAPMS Board will evaluate the feasibility of adding a Kindergarten and a middle school program, an event that will most likely be after the third operating year.

## I.3 Educational Program Design

### **Evaluation Criteria:**

*Reviewers will look for an educational program design that:*

- *Is clear and coherent;*
- *Is based on effective, research-based educational practices and teaching methods, and high standards for student learning;*
- *Aligns with the school's mission and responds to the needs of the school's target population, and*
- *Presents evidence that the proposed approach will lead to improved student performance for the school's target population.*

### **I.3.A. Daily Schedule and Annual Calendar**

A typical student day at the School will include a morning uninterrupted work period of 3 hours. This period will be taken up by work of the student's selection and consultations and lessons with the teacher as needed to ensure that progress is made in all standard content areas. The morning work period may be followed by recess or lunch. The lunch period may include a seminar-type discussion, and parents and community members will be invited to participate in these lunches. Recess may follow lunch if not before. The afternoon may consist of special subject instruction, including but not limited to structured language lessons, music, art, movement/yoga/physical education, as well as individual work blocks, class meetings, and Montessori practical life instruction, which can range from gardening and sewing to test-taking strategies.

The Montessori classroom is an active, industrious place. Aided by daily and weekly goals set in consultation with the teacher, students may begin the morning work period by choosing work from a variety of prepared materials or having individual or group lessons. Perhaps today it will be a building project that teaches spatial relationships and essential math concepts, or maybe two or three students will choose to collaborate on a project that combines Greek history and geography. Throughout the day's generous work periods, teachers will move around the multi-age classroom challenging, encouraging, and, when necessary, redirecting energies. Whole-group lessons and assignments will be used sparingly, in recognition of the fact that students are engaged in learning that is focused on individual abilities and interests.

In Montessori classrooms, appropriate conduct and respect for others are fully integrated into the curriculum and the environment. Despite a variety of learning activities taking place at once, the classroom culture promotes an atmosphere of order, calm, and civility. Class meetings are held periodically, and decision-making follows a consensus model. In this way, students grow to understand and prepare for their future roles in society.

The following daily schedule provides an example of how a day may be structured at the SAPMS:

- |            |   |
|------------|---|
| 8:15–8:30  | Students arrive, greet their teacher, and begin choosing their work for the day.  |
| 8:30–11:30 | Work time: Children work individually or with others and receive small or large group lessons. This 3-hour block contains the core curriculum – math, language arts, science, geography, and history. Additional subjects such as current events and activities such as class meetings and library visits may be added. |

- 11:30–12:00 Lunch: Lunchtime is instructional time, as it is held in the classroom with the teacher or assistant and includes lessons in grace and courtesy, positive social interaction, problem-solving, and conflict resolution.
- 12:00–12:30 Recess
- 12:30–2:45 Physical education (movement, dance, yoga); music; drama; art. This is also time for additional cultural studies (science, geography, history, etc.), small group presentations, and additional work time.
- 2:45 - 3:15 Classroom cleanup and dismissal.

The annual calendar and instructional time for the SAPMS will generally follow the same annual calendar as the SJCS. Specific teacher in-service training days may vary from those the District designates but will be approximately equal in number. The amount of instructional time will correspond to the District amount. Generally, following the above schedule will ensure that students participate in a minimum of five hours of work time per day for at least 180 days per year.

### **I.3.B. Proposed School's Educational Program: The Montessori Curriculum**

SAPMS will provide an authentic Montessori school in Saint Johns County. The Montessori Method is an established approach to education that successfully meets children's individual needs while educating them to become contributing, productive citizens. The highly structured teaching methodology is designed to provide an activity-based curriculum through an individualized approach supplemented with experiential components such as discovery-based activities. The program initiator, Dr. Maria Montessori, was a physician who worked with and developed a method whereby even mentally deficient children could learn and even pass national education exams. The amazing success of the children educated in this manner, many of whom could read, write, and carry out mathematical functions at ages 4 and 5, has been celebrated worldwide.

SAPMS will incorporate the following elements of the Montessori experience into its curriculum:

1. Multi-age classrooms that are divided into three-year spans (Grades 1-3 and 4-6) based on developmental windows, rather than single grade (see page 10).
2. A *prepared environment* consisting of specific, hands-on, sequential materials and curriculum created by Dr. Maria Montessori and other trained Montessori educators. Children "own" the environment, create it, and are responsible for it (see page 10).
3. Work periods where children are allowed to select work of their own interest and concentrate on it for up to 3 hours in as much depth as they desire with minimal guidance from a teacher (see page 12).
4. A focus on cooperation rather than competition (see page 13).
5. Holistic education and integrated instruction, whereby all-encompassing lessons that unite all curriculum subjects are presented to provide a universal syllabus from which the children can find meaning and connections in core subjects as well as with languages, art, music, and physical education. Dr. Montessori referred to this holistic framework as *cosmic education* (see page 13).
6. Montessori-trained teachers (see page 14).

7. The active involvement of children, parents, and community members and organizations in learning opportunities, both inside and outside of the school building, and in partnerships with the school (see page 15).

Each of these elements is described further below.

### **Multi-age Classroom: The Three-year Cycle**

Montessori classrooms run on three-year cycles. SAPMS will encompass the cycles of six-to-nine and nine-to-twelve year-olds. The completion of these cycles is vital to the individual child's level of achievement and to the educational process of the community as a whole. This program creates a dynamic community of beginning, mid-, and end-cycle children who stimulate and support one another in their development and learning, without which spontaneous education would not be possible.

SAPMS will attempt classroom makeup of eight to ten children, balanced as much as possible by gender, temperament, ability, and development, of each of the three age levels. The third-year children create the ambiance in which the first- and second-year children work. Of the two semesters, the first is a more calm and ordinary time so that the new children can settle in. Already in this first semester, though, groups are forming and reforming for plays and other projects, drawing in even the youngest children.

Peer mediation is fostered in the Montessori elementary classroom. The children are prepared and supported to resolve their specific or generalized and ongoing interpersonal issues, guided and encouraged by a teacher and according to Montessori principles and within school policy. The classroom becomes a self-managing community with the children's own ordering, organizing, and managing the daily operations of their environment. The skills and attributes of character and integrity that the children develop by educating themselves and one another and confronting their own issues in the classroom will empower them as adults.

The three-year cycle provides the stimulation and motivation for the core subjects that takes the child further than any drilling or urging from adults can. The high energy, channeled constructively, envelops the younger children and charges them up to get "on a roll" in math, history, geography, science, language, and art. The children's work is fueled by desire. They become passionate learners and workers. The enthusiasm is contagious and spreads to the reluctant and apprehensive few. Discipline, attention to detail, clear focus, and long concentration are introduced immediately and then develop at different rates and to different degrees for each child. They are encouraged to the level each individual child can attain. Some children take much longer than others to develop these traits, and learning from the positive example of peers is part of the reason for including the different ages in one classroom.

### **The Prepared Environment**

In a Montessori classroom, the environment is prepared in advance and re-prepared daily in every detail of every aspect for a particular three-year age span to stimulate and support self-development and education within an integrated holistic curriculum. The prepared environment of a Montessori classroom is set up to foster the developmental goals of each plane of development. The classroom is prepared for the students to learn at their own pace, using materials as long as they need them, and creating an optimal place for "self-mastery." The classroom is set up with respect to their social, emotional, and intellectual needs.

The Montessori materials are designed to provide the keys to self-development and auto-education, a difference from those used in traditional elementary classrooms. SAPMS faculty will strive to use only Montessori materials. Montessori materials are designed for use by individual students or small groups,

rather than as teacher presentation aids. In math, materials represent math concepts, such as fractions and decimals. In geography, students work with puzzle maps, in which each continent has been made into a puzzle, the pieces of which are countries. The materials are integrated, which allows the child to store the information in several places in his or her brain, leading to increased retention and comprehension.

In Montessori schools, the child learns from the environment, and it is the teacher's job to put the child in touch with the environment, not to "teach" the child. Thus, the teacher creates the environment and selects the materials for the most part, and these tasks are extremely important and part of a process that gives a unique quality to each classroom that encourages individualized learning.

The classroom materials and lessons in the Montessori elementary are designed to support the characteristics of the Second Plane of development – that time in the child's life when the child's development occurs in and through the community of their peers. Books become increasingly important, since the child's reading ability is growing. Sensorial materials, while still an important part of the environment, are presented with the understanding that they are preparations for "doing it all in your own head." Field trips and "Going Out" become feasible and are an important aspect of the child's self-education.

The Montessori classroom requires a large space because Montessori is materials-intensive and allows for freedom of movement. The classroom, called a *Montessori environment*, should have 25-30 students.

Each environment will have about a dozen open shelves arranged around the classroom to create separate and defined areas of study. Each area will have a large set of complete didactic materials and lessons. Children will freely choose their tasks so long as they know how to use the material. If they do not, they may ask for an individual presentation. A Montessori environment is maintained in impeccably neat and orderly condition always by the children, not the adults. Areas of material focus include the following:

- Practical life (necessary for fine motor development and the ability to increase the child's focus and concentration, as well as sense of independence)
- Sensory-motor education and cognitive skills development
- Language arts materials
- Mathematics
- A library and listening center
- An art center
- A social studies center
- A science area that includes botany, zoology, animal classification and microscopy.

Teachers will work with children individually, for the most part, and in group sessions once or twice daily. The SAPMS will provide small lightweight tables (half as many as the number of children) and carpets or mats for working on the floor. Children will work at their own paces. The teacher will move about the room, often sitting on the floor with a child or sitting in a quiet corner observing what the students are doing so as to evaluate their progress and chart the children's individual lesson plans for the following day.

In a Montessori environment, a quiet buzz of activity is often present, but loud or abrupt noises are not encouraged. Discipline is self-oriented; children are offered limited choices if they cannot make their own. No one is permitted to interrupt, bother, or infringe upon another child's work or rights. Everyone's individual needs are always respected. Social interaction is spontaneous and voluntary; children offer to help others as their own intrinsic needs are satisfied. Group lessons are encouraged but not forced; a child may choose not to participate if engaged in a personal activity and does not interrupt the group activity. Children usually choose to join the group if it is interesting (although some watch and absorb from a distance); if it is not interesting to the children (as indicated by their lack of interest and participation), the teacher must change the activity.

The environment is not constant; it evolves. As children progress in skills, materials that have been mastered are put away as new ones are introduced. Even the room arrangement may change throughout the year, as the group's needs change. The environment reflects an ongoing repeating cycle of observation, change, and mastery.

## **Work Period**

In a Montessori Work Period, children are allowed to research and investigate topics of their own interest in as much depth as they desire with minimal guidance from a teacher. This child-centered approach allows each child to contribute to his or her own instructional plan and to select work and concentrate on it for up to three hours and to master it at his or her own pace. This approach engages children as active participants in their own educational process.

The prepared environment encourages spontaneous activity in education, the process by which the child struggles to unfold his own highest and best intellectual, emotional, and social development through choice of work, concentration and focus, independence and collaboration within a self-managing classroom. The classroom is dynamic in that children are encouraged to move around to make choices of activity, as opposed to desk-bound activities.

The most important criterion for an elementary Montessori class is student activity. For 3-4 hours a day, students engage in individual and small group work of their choice. These choices are guided by the teacher. Students also receive instruction individually or in small groups. The children and the teacher understand that, following a lesson, a child is obligated to do and to complete the work. Academic work at SAPMS most often will be initiated by each individual student, with more directed instruction in reading and mathematics, or when materials or concepts are introduced.

Time per subject will be allocated as a 3-hour uninterrupted block of work time available each day since the subject matter will be highly integrated. Each child will have his or her own work plan, which will be carried out under the guidance of the teacher to ensure that all standards are addressed. Completion of projects is just as critical as initiating them in the Montessori Method, and teachers will work with the children to ensure that they complete one task or big project before moving to the next.

The multi-age structure of the classroom allows students to learn from each other, and in turn, to teach. The age/grade level assumes less importance and each child is allowed to progress as he or she is capable, at a pace that is comfortable for him or her to master a given concept. The children will cover all material required by Montessori and Florida standards, but may achieve mastery at different times during the 3-year cycle.

Many parents observe that their children are not embracing the traditional classroom experience, or that their knowledge and talents are not coming through in the traditional classroom. The Montessori curriculum and materials engage children in their own learning process. Since the child chooses his or

her own work, it is meaningful to the child rather than just being “something the teacher is making me do.” Exploration of an idea can lead anywhere the child wishes to take it, and the Montessori teacher guides the student’s academic work with careful observation of each child’s interests and abilities.

### **Cooperation Not Competition**

Another important aspect of Montessori classes is an attitude of cooperation rather than competition. It is common for students to ask other students for help. In keeping with a reduced emphasis on conventional testing, answers to problems are made available to students. The development of individual responsibility is emphasized. The children maintain the classroom and materials, and participate in developing class rules. The children support and assist one another in their struggles and successes.

Work is not graded, nor are there other forms of reward or punishment, subtle or overt. Assessment is by portfolio and the teacher's observation and record keeping. The test of whether or not the system is working lies in the accomplishment and behavior of the children, their happiness, maturity, kindness, love of learning, and level of work.

Public Montessori schools comply with requirements for achievement tests, although many Montessorians do not see these tests as being good indicators of what students actually learn. Students design contracts with the teacher to guide their required work, to balance their general work, and to teach them to become responsible for their own time management and education. Children self-evaluate while learning and demonstrate accountability for making their highest effort. They regularly record progress in their work plans and periodically assess through individual conferences and reviews with the teachers. The teacher is responsible for engaging, as much as possible, each child in his or her own assessments.

Children compete daily with each other both in class and on the playground. However, Montessori objects to competition when it is used to create an artificial motivation for student achievement, as in grades or class rank. The Montessori learning focus leads to children who are not afraid of making mistakes. They quickly discover that few things in life come easily, and they can try again without fear or embarrassment.

### **Holistic and Cosmic Education**

A major element of Montessori philosophy, the word holistic means two things: 1) the focus of education should be on the whole child, not individual subjects and 2) courses should be interrelated so that the child understands the inter-connections of life. Thus, in addition to cognitive achievement, the learning environment focuses on the physical, psychosocial, and moral aspects of the person. To accomplish this, student-parent-teacher partnerships are an integral part of the learning environment.

SAPMS will integrate the visual arts, music, and physical education into the classroom. The Montessori approach emphasizes the natural world. Therefore, outdoor natural areas and gardens will continue to be planned and created with significant student input.

An often-overlooked component of the Montessori approach is called the *Grace and Courtesy Lessons*, an almost 100-year-old approach for teaching what is today popularly referred to as “character education.” These lessons can be as simple as learning to get oneself a facial tissue to more complex lessons such as introducing peers and adults and participating in civil classroom discussion. Learning Grace and Courtesy Lessons is enhanced by the multi-age atmosphere of the 3-year span classroom,



where there are opportunities for modeling behavior and where the teacher and many of the students remain the same from year to year, allowing for deeper, more respectful relationships to develop.

*Cosmic Education* is the name of the elementary curriculum focused on the integrated study of the history of the universe, the coming of life, the evolution of plants and animals, the rise of humans, the development of civilizations throughout which geography, history, zoology, botany, and earth sciences are woven and from which mathematics, language, and the arts are derived. It emphasizes love and service as unifying principles and gives the children a sense of the meaning and purpose of their own and every other creature's life on earth.

The *Cosmic Plan* is the way the world is interconnected and interdependent. A simple example is the carbon dioxide released from animals as a waste product that is a necessary component of photosynthesis in plants and the oxygen they release that animals would die without. The lesson, on a fundamental level, is about the contribution each makes to the continuation of life, and by extension, each individual's role or contribution to this "big picture."

*Life progresses according to a cosmic plan and the purpose of life is not to achieve perfection along an unlimited line of progress but to exercise influence and to achieve a definite aim upon the environment... Similarly all other animals by the process of feeding themselves or seeking food carry out a "cosmic" task which contributes to keep nature in a harmonious state of purity... the universal syllabus that can unite the mind and the consciousness of all men in one harmony, that we intend by "Cosmic Education." This education must take its departure and spread from one centre, the cosmic plan of creation. (Montessori, Basic Ideas of Montessori's Educational Theory, pg. 129 & 131.)*

More about the Montessori curriculum and how it is organized so that it is easily correlated to and aligned with the Florida State Standards is presented in **Section I.4, Curriculum Plan** (see page 22).

## **Montessori-Trained Teachers**

SAPMS faculty will either be hired with or trained in the highly developed and scientifically designed Montessori Method. Montessori training is rigorous and requires a great deal of commitment from teachers. The administration and teachers will be screened for their basic attitudes in education. The Principal will become an important advocate for the program as well as a liaison with the SJCS.

Teachers trained in the Montessori Method use a tested and proven framework for instruction. Teachers must stay within strict teaching guidelines and develop a "portfolio" type individualized teaching guidebook that becomes the basis of their teaching methodology. The Montessori teacher represents the values, embodies the standards and policies of the school, prepares the environment, trains and oversees the assistant, leads the community, gives the presentations, provides the structure, sets the limits, monitors development and learning, interprets Montessori education, and describes the child's progress for the parents. The Montessori Teacher's Aide is the invaluable adult who offers the extra set of eyes, ears, and hands to support and assist the work of the teacher through research, organization, observation, material-making, and preparation of the environment.

The teaching ratio is one trained Montessori teacher and one teaching aide to 25-30 children. Rather than lecturing to large or small groups of children, the teacher is trained to teach one child at a time, and to oversee 30 or more children working on a broad array of tasks. He or she is facile in the basic lessons of math, language, the arts and sciences, and in guiding a child's research and exploration, capitalizing on his interest in and excitement about a subject. The teacher does not make assignments or dictate what to study or read, nor does he or she set a limit as to how far a child follows an interest.

The Montessori teacher spends a lot of time during teacher training practicing the many lessons with materials in all areas. She must pass a written and oral exam on these lessons to be certified. She is trained to recognize a child's readiness according to age, ability, and interest in a specific lesson, and is prepared to guide individual progress.

The two major organizations offering Montessori training in the United States are the Association Montessori Internationale (AMI), with a U.S. branch office called AMI-USA, and the American Montessori Society (AMS). Most training centers require a bachelor's degree for admission. Training ranges from 200 to 600 pre-service contact hours and covers principles of child development and Montessori philosophy as well as specific uses of the Montessori classroom materials. Montessori training centers can be found across North America and around the world.

## **Family and Community Involvement**

A strong parent involvement program is necessary to support a Montessori program. The role of the Director in public relations is important because, in the beginning, parents may not understand how their children are learning and why they have no book bags, for example. Parents play a significant role in a Montessori school community, and significant efforts are made to ensure that all parents understand and support their children's learning experience as much as they are able. SAPMS recognizes that every parent and every child have special talents.

Because independent and group research is a strong component of the Montessori approach, the community is an extension of the classroom, and children are active in seeking information from resources outside the school that enhance their knowledge in a given area of study. The students are allowed time and encouraged to seek means to offer services to their own school and to the larger community. This idea of the community as an extension of the classroom is executed in the Montessori curriculum as occasions referred to as *Going Out*.

Going out is an essential element in the Montessori elementary program and is very different from a traditional field trip. Just as younger Montessori children are presented with real implements and given real responsibilities in the care of the environment and care of the self, the child at the Elementary level is given real situations in which to exercise will and judgment. These Going Out opportunities represent formal forays into the world in search of knowledge and experiences related to the child's classroom work. They usually involve groups of children but may be initiated by one or more children interested in a particular subject. These research trips differ from traditional field trips insofar as they are initiated, planned, and executed by the child, not the adult, and they arise spontaneously from the interest and work of the child, not from a plan of instruction made by the adult.

Going Out for a young elementary child might be as simple (from the adult perspective) as a trip to the public library to look for books or articles not available at school. An older child who is more capable and ready to take on more responsibility might organize a trip to a university to interview a zoologist or a poet, a trip to an air traffic control facility to conduct research on air safety, or a trip to a stable to learn about care and training of show horses. Whereas the primary Montessori classroom (ages 3-6) provides a kind of protective "cocoon" in which the child can develop himself safely and without distraction, the Montessori elementary "Cosmic Education" claims the world for the classroom. The role of the adult is to provide a clear process for the children to follow as they prepare for Going Out and to support them through the steps of this process as needed.

In a well-planned Going Out, the children can find expression of almost every universal human tendency:

- *Exploration* linked to intrinsic interest.

- *Orientation* in a strange place or situation, leading to a greater sense of orientation within the cultural milieu.
- *Order* in the planning and execution of the things that will need to be done before and during the trip.
- *Self-control* in a very stimulating and perhaps daunting situation.
- *Imagination*, in the conception of the Going Out and the hypothetical thinking involved in the planning phases.
- *Abstraction* in the gathering of data and the subsequent synthesis and follow-up work in class.
- *Work and movement* in the trip itself.
- *Repetition* in the reliving of the experience through presentations to the teacher or class.
- *Perfection* in the care with which the planning and execution are done and in the “post mortem” thinking about what could have been done differently to make the trip even more successful.
- *Communication and belonging* in every aspect of the group’s planning and execution.

Exploration of each curriculum area is encouraged through trips outside the classroom to community resources, such as a library, historical resource, natural environment, science museum, local businesses, etc. This inclusive approach to education fosters a feeling of connectedness to community, nation and all humanity, and encourages each child's natural desire to make contributions to the world

*When a child goes out, it is the world itself that offers itself to him. Let us take the child out to show him real things instead of making objects which represent ideas and closing them in cupboards.--*  
Maria Montessori

### **I.3.C. Research Base for Montessori Education: Literature Cited**

Research shows Montessori children perform to high standards in all areas when compared to traditional school children. The literature about the performance of Montessori-educated children document studies that suggest children in Montessori environments fare at least as well as their non-Montessori counterparts in academics, social awareness, and success outside of school. While the St. Johns County public schools excel, Montessori education may provide a more suitable approach for some children. This research base section references data showing that children able to experience Montessori school have an excellent chance of being highly effective on assessments, in life, and in the St. Johns County Public School system if they decide to enter or reenter a non-Montessori public school.

Montessori-educated children generally actively seek knowledge and know where and how to look for information. They tend to approach learning by questioning, analyzing, comprehending, and discussing topics, rather than by memorizing or completing workbook assignments. Rathunde (2003) reported that “Montessori middle school students reported more positive motivation and experience than a matched sample of students from traditional middle schools.” Dawson (1987) found that Hispanic and black Montessori students enrolled in a public magnet school have significant academic advantages over the test and district norms compared in the study. Students at Bunche Elementary School, a public pre-K to fifth-grade Montessori magnet school in Indiana, are repeatedly among the top performers on the Indiana ISTEP+ test (Robinson, 2006).

In 2007, Jacobson reported that the third-grade students at the public Robert Goddard Montessori School in Prince George’s County, Maryland, exceeded county and statewide averages on the Maryland

School Assessment tests in math and reading. Additionally, while other children throughout Prince George's County declined in proficiency as they reach middle grades, the children at Goddard continued to excel. Reports indicate that 85.7 percent of Goddard's eighth graders reached proficiency levels in math, compared with 35 percent of children across the county.

Research by Angeline Lillard (2006) compared outcomes of children at a public inner city Montessori school in Milwaukee with children who attended other types of schools within the Milwaukee school system. Among the reasons Lillard chose the Milwaukee school district was its association with the Association Montessori Internationale (AMI). Because the name Montessori is in the public domain, there are no regulations or restrictions to its use. She reasoned that the school system's association with AMI ensured they would have a more faithful interpretation of Montessori's philosophy.

This study is significant in that it controlled for any parental bias that might exist for choosing a Montessori education for their children. The study used the public school's lottery system, comparing children who "won" the lottery into Montessori classrooms with children who "lost" and were placed into other Milwaukee system programs, including magnet, charter, and gifted programs. Because this lottery is random, the children in the experimental group enrolled in the Montessori program were expected to be similar to the children in the control group (those enrolled in other programs). The families of both groups had similar education levels and average incomes.

Each group was tested for cognitive/academic and social/behavioral skills selected for their importance in life outside of school. The results showed significant advantages for the Montessori group over the control group. "By the end of kindergarten, the Montessori children performed better on standardized tests of reading and math, engaged in more positive interaction on the playground, and showed more advanced social cognition and executive control. They also showed more concern for fairness and justice" (Lillard, 2006).

About 200 studies of Montessori educational outcomes have been performed. Mary Maher Boehnlein (1990) and John Chattin-McNichols (1992) collected and analyzed that evidence. After reviewing 84 studies they concluded that "Montessori children show increased competence over time...children evidence more curiosity than children in non-Montessori programs...it is clear that Montessori does benefit lower socioeconomic children, that Montessori children experience aid in social development, that Montessori activities enhance perceptual development, etc."

While there are legions of Montessori graduates who appreciate their experience, SAPMS will not offer promises of measurable academic gains in a short time. Montessori education requires commitment, time, and trust. And, although test scores seem to improve in most cases, to attach one's evaluation of Montessori education to standardized test scores is a disservice to both Montessori teachers and children. The approach is a way of viewing, respecting, and supporting the growth of children. It is as much an end as a means.

What makes Montessori education so advantageous over other educational programs? Rathunde (2001) credits the concept of optimal experience, or "flow," which is the adult version of Montessori's concept of "normalization" for children. When the level of challenge and level of skill are equal, there is a state of "flow" that is indicated by deep concentration and periods of complete absorption in one's work. As adults, we have all experienced those occasions when we become so interested in a particular activity that we lose track of time, forgetting even basic needs such as eating. We feel invigorated and energized after these occasions, not tired or worn out. According to Montessori (1966), children experience these same sensations and this is when the best learning takes place.

Cossentino explored this idea of normalization and the Montessori concept of “work” in her 2006 paper “Big Work: Goodness, Vocation, and Engagement in the Montessori Method.” While much research suggests that children learn through play, all activities in a Montessori classroom are referred to as “work.” To understand this, it is necessary to look at the concepts of “work” versus “play.” Work is engrossing, natural, and effortful. It is not an escape from “real life,” as fantasy play is, but a path towards fulfillment (Cossentino, 2006).

Because Montessori puts the focus on the child, let’s look at what children say about work and play. Two responses by elementary-aged Montessori children recorded by Cossentino (2006) are “Play is when we get hot and tired outside; work is when you don’t get tired” and “When you play, you get rid of energy. When you work, you keep your energy.” The Montessori classroom fosters repetition and concentration over simple task completion.

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### **I.3.D. Montessori Curriculum Alignment with Mission**

The Montessori Curriculum, Method, philosophy, and culture are the essence of the mission of SAPMS. The reason for starting the School is to provide an authentic Montessori education program for any student in Saint Johns County who chooses it. The SAPMS will administer the Montessori philosophy in a learning environment for children during their most formative years. These young children will be given the opportunity to explore their individuality, delve more deeply into areas of academic interest, participate as a member of a school community, and examine their relationship with global issues.

The elementary program at the SAPMS will offer the following:

- Presentation of the formal scientific language of zoology, botany, anthropology, geography, geology, etc., exposing the child to accurate, organized information and respecting the child's intelligence and interests.
- The use of timelines, pictures, charts, and other visual aids to provide a linguistic and visual overview of the first principles of each discipline.
- Presentation of knowledge as part of a large-scale narrative that unfolds the origins of the earth, life, human communities, and modern history, always in the context of the wholeness of life.
- A mathematics curriculum presented with practical, hands-on materials that simultaneously reveal arithmetic, geometric, and algebraic correlations.
- Emphasis on open-ended research and in-depth study using primary and secondary sources (no textbooks or worksheets) as well as other materials.

Like most Montessori elementary programs, the children at the SAPMS will be divided into two groups: early elementary, which includes ages 6 to 9, and upper elementary, which includes ages 9 to 12. The curriculum is composed of interwoven subject areas, which are described below. The core academic subjects of mathematics, language, and cultural studies are initially introduced through the Five Great Lessons. SAPMS's curriculum is designed to address the psychological characteristics of children in the second plane of development, which include a stronger capability of effort and concentration, an immense desire for knowledge, a stronger need to satisfy intellectual curiosity, development of the powers of imagination, and heightened social exploration. More information about the Montessori Planes of Development and the Five Great Lessons is presented in Appendix A.

Accountability in this differentiated model may be assured through use of work plans and/or record sheets. Teachers may meet with each child daily or weekly to develop a work plan (Individualized Learning Plan), for the following week, which includes a checklist of activities the child should complete. These activities are selected based on the child's interest, ability, and age, within the context of the state standards for that grade level. While children are allowed to choose their own work, it is understood that when a child receives a new lesson, that child is then obligated to do and complete the work. The work plans ensure that each child knows which activities she or he is expected to complete.

Depending on the child's normalization, the activity may be teacher-checked or self-checked, and the recording format varies from a teacher-provided sheet to one that the children create themselves (e.g., journaling). Once this process is complete, each child may record his completed work on the record sheet. In this way, children develop specific skills in collaboration with their teachers and a classroom environment that is prepared for them. The goal of SAPMS elementary program is for children to develop themselves as individual beings and to master the process of learning, thereby creating a solid foundation for personal and academic success.



### I.3.E. Meeting the Standards

SAPMS will participate in the required Florida Statewide Assessment program, including the components of the Florida Comprehensive Assessment Test (FCAT) and any changes or additions made during the contract period. SAPMS also will use Montessori assessment methods to determine which students are meeting the State standards correlated with Montessori standards.

The SAPMS is fortunate to have access to two educators with expertise and experience in correlating the Montessori curriculum with State and Federal standards. SAPMS will use this in-house expertise as well as information from other schools to develop our own alignment tables with the Next Generation Sunshine State Standards and the Common Core standards when they are adopted. In the event that we need additional help, several professional curriculum correlation organizations can be contracted to do this work or, alternatively, the School may choose to use an existing alignment of standards from a comparable school.

### I.4. Curriculum Plan

#### **Evaluation Criteria:**

*Reviewers will look for a curriculum plan that:*

- *Provides a clear and coherent framework for teaching and learning;*
- *Is research-based;*
- *Is consistent with the school's mission, educational philosophy and instructional approach;*
- *Will enable students to attain Next Generation Sunshine State Standards and receive a year's worth of learning for each year enrolled, and*
- *Will be appropriate for all students at all levels.*

SAPMS's course of study will encompass the full substance of the Sunshine State Standards and focus specifically on teaching students how to think clearly, do their own research, express themselves well in writing and speech, and put their knowledge into practical application. The course of study will be organized as an inclined spiral plane of integrated studies, rather than a traditional model in which the curriculum is compartmentalized into separate subjects, with given topics considered only once at a given grade level. Lessons will be introduced simply and directly in the early years and will be reintroduced several times during the following years at increasing degrees of abstraction and complexity.

Our course of study will be an integrated thematic approach that ties the separate disciplines of the curriculum together into studies of the physical universe, the world of nature, and the human experience. This integrated approach will be one of the school's greatest strengths. In alignment with the prescribed purpose of a charter school, the program will be rigorous yet innovative in its design. Although we will have a warm, supportive academic atmosphere, we will set a high level of expectation for the quality of thought, work, and mastery of content and skills. The children will be challenged to pursue a considerable amount of library and field research both in and outside of school. We will consciously teach students how to develop effective work habits and test-taking strategies.

#### **I.4.A. Core Curriculum**

SAPMS's Elementary Program includes 10 key curricular areas: Language Arts, Mathematics and Geometry, Geography, Earth and Physical Science, Biology, History/Social Science, the Arts (Visual Arts, Music, Drama, Movement), Character and Peace Education (Service Learning), Practical Life, and Health and Physical Education.

The following discussion presents a summary of the planned core curriculum of the SAPMS and a list of the specific types of activities that may be covered under each area. Reading and language arts are described separately in **Section 1.4.C. Reading Curriculum** on page 35. Curriculae in art, music, and physical education meeting the State and Federal Standards as well as other areas will be interwoven into the Montessori curriculum and is described within the “Core Curriculum” because it is not considered separate under the Montessori philosophy.

Much of the elementary Montessori curriculum builds on the Montessori primary curriculum for ages 3-6. The sequential mastery of the materials and concepts makes Montessori experience important for the child entering a Montessori Elementary classroom. A few of the important primary-level building blocks are listed in the descriptions below to illustrate this point. A child entering a Montessori elementary class without the primary class foundations important to the particular work may need to start with the materials from the beginning to establish a firm grasp of the concept before moving to the abstract work at the elementary level.

Montessori subject areas include the following ten key curricular areas:

- Language Arts
- Mathematics & Geometry
- Geography
- Earth and Physical Science
- Biology
- History/Social Science
- The Arts (Visual Arts, Music, Drama, Movement)
- Character and Peace Education (Service Learning)
- Practical Life
- Health and Physical Education

Each of these curriculae is described in the sections below in greater detail. More detail of the Montessori subject Areas follows, with the detail for the Language Arts Subject Area listed separately in **Section 1.4.C. Reading Curriculum** on page 35. In addition, an example of a checklist of the type that will be used to track student progress is included as Appendix B.

## Language Arts

The Montessori curriculum is an experiential, practical way to learn about language. The preparation for reading and writing begins in the preschool, giving the child direct and indirect lessons with the spoken and written word. Many lessons incorporate all three learning parts of the brain: visual, auditory and kinesthetic. This continues into the elementary classroom, with a focus on surrounding the child with wonderful literature and exposing them to many different types of writing through read-alouds, journaling, topical discussions, book clubs, creative writing, poetry, descriptive writing, research, etc. The aim of Montessori grammar lessons at the elementary level is to see the diversity of language, to explore how words do their work, how to classify words, and how to evaluate the essence of language and how it changes over time. Other important aspects of the language curriculum include word study, sentence

analysis (subject, predicate, indirect and direct objects), and mechanics of writing (capitalization, punctuation, etc.).

## **Math and Geometry**

The Montessori math curriculum is an integrated approach that builds upon itself as a child moves through the curriculum. The child's sequential experiences in this area ultimately lead the child to discover many different mathematical concepts. Maria Montessori said "Our aim is not only to make the child understand, and still less to force him to memorize, but so to touch the imagination as to enthuse him to his innermost core." Her cosmic theory that, as teachers we plant the seeds, becomes apparent again in the math curriculum. One of the most important parts of Maria Montessori's math curriculum is that it moves from the immediately practical to the abstract. The materials were designed to be self-correcting, thus reinforcing independence and problem solving. The children are encouraged to help each other, since they learn best by teaching. The Montessori Method gives the child a strong foundation in mathematical concepts that include numeration, place value, qualitative and quantitative concepts (addition, subtraction, multiplication and division), fractions, decimals, multiples, statistics, squaring, cubing, introduction of algebra, measurement, and the Pythagorean Theorem. In geometry, the child discovers relationships between figures, and learns the rules of geometry through discovery.

Some of the topics included in the math curriculum are presented below.

- Montessori students learn the numbers and number symbols through the red and blue rods, sandpaper numerals, association of number rods and numerals, spindle boxes, cards and counters, counting, sight recognition, and the concept of odd and even.
- Introduction to the decimal system--units, tens, hundreds, thousands represented by specially prepared learning materials that show the decimal hierarchy in three-dimensional form: units=single beads, tens=a bar of 10 units, hundreds=10 ten beads fastened together into a square, and thousands=a cube ten units long, ten units wide, and ten units high. The children learn to first recognize the quantities, then to form numbers with the bead or cube materials through 9999 and to read them back, to read and write numerals up to 9999, and to exchange equivalent quantities of units for tens, tens for hundreds, etc.
- Linear Counting: learning the number facts to ten (what numbers make ten, basic addition up to ten: learning the teens ( $11 = \text{one ten} + \text{one unit}$ ), counting by tens ( $34 = \text{three tens} + \text{four units}$ ) to one hundred.
- Development of the concept of the four basic mathematical operations: addition, subtraction, division, and multiplication through work with the Montessori Golden Bead Material. The child builds numbers with the bead material and performs mathematical operations. Work with this material over a long period is critical to the full understanding of abstract mathematics for all but a few exceptional children. This process tends to develop in the child a much deeper understanding of mathematics.
- Development of the concept of "dynamic" addition and subtraction through the manipulation of the math concepts such as addition and subtraction where exchanging and regrouping of numbers is necessary.
- Memorization of the basic math facts: adding and subtracting numbers under 10 without the aid of the visual materials. This typically begins at age 5 and is normally completed at age 7.

- Development of further abstract understanding of addition, subtraction, division, and multiplication with large numbers through the Stamp Game: This manipulative system represents the decimal system as color keyed "stamps" and the small and large bead frames (color-coded abacuses).
- Skip counting with the chains of the squares of the numbers from zero to ten: i.e., counting to 25 by 5's, to 36 by 6's, etc., for ages 5-6. This exercise develops the first understanding of the concept of the "square" of a number.
- Skip-counting with the chains of the cubes of the numbers zero to ten: i.e., counting to 1,000 by ones or tens. Developing the first understanding of the concept of a "cube" of a number.
- Beginning the "passage to abstraction:" the child begins to solve problems with paper and pencil while working with the visual, practical materials. Eventually, the materials are no longer needed.
- Development of the concept of long multiplication and division through practical work with the bead and cube materials. The child engaged in this work is typically age 6 or younger, and cannot yet do such problems on paper without the hands-on materials. The objective is to develop the concept first.
- Development of more abstract understanding of "short" division through more advanced manipulative materials (Division Board); movement to paper and pencil problems, and memorization of basic division facts. This normally occurs by age 7-8.
- Development of still more abstract understanding of "long" multiplication through highly advanced and manipulative materials (the Multiplication Checkerboard). This usually occurs at age 7-8.
- Development of still more abstract understanding of "long division" through highly advanced manipulative materials (Test Tube Division apparatus). This typically occurs at age 7-8.
- Solving problems involving parentheses, such as  $(3 \times 4) - (2 + 9) = ?$
- Missing sign problems: In a given situation, should you add, divide, multiply or subtract? This introduction to problems involving tens of thousands, hundreds of thousands, and millions typically occurs by age 7.
- Study of fractions: This activity normally begins when children using the short division materials find that they have a "remainder" of one and ask whether or not the single unit can be divided further. The study of fractions begins with practical materials (the fraction circles), and involves learning names, symbols, equivalencies common denominators, and simple addition, subtraction, division, and multiplication of fractions up to "tenths." This typically occurs by age 7-8.
- Study of fractions greater than one, comparing and ordering fractions.
- Study of decimal fractions: all four mathematical operations. This normally begins by age 8-9, and continues for about two years until the child totally grasps the ideas and processes.
- Practical application problems, which are used to some extent from the beginning, become far more important around age 7-8 and afterward. Solving word problems and determining

arithmetic procedures in real situations becomes a major focus. Includes ratio and rate problems.

- Telling time
- Money: units, history, equivalent sums, foreign currencies (units and exchange). (Begins as part of social studies and applied math by age 6.)
- Real-life percent problems going from concrete to abstract, including interest.
- Computing the squares and cubes of numbers: cubes and squares of binomials and trinomials. This normally occurs by age 10, based on hands-on materials familiar since primary class.
- Calculating square and cube roots: from concrete to abstract. This normally occurs by age 10 or 11.
- The history of mathematics and its application in science, engineering, technology and economics.
- Reinforcing the application of mathematical skills to practical problems around the school and in everyday life.
- Basic data gathering, graph reading and preparation, and statistical analysis.
- Analyzing data in tables and graphs.
- Writing, solving and graphing linear equations and inequalities; an understanding of slope.

Sensorial exploration of plane and solid figures begins at the Montessori primary level (ages 3 to 6). The children learn to recognize the names and basic shapes of plane and solid geometry through manipulation of special wooden geometric insets. They then learn to order them by size or degree. Some of the topics included in the geometry curriculum are presented below.

- Stage I: Basic geometric shapes (age 3-4).
- Stage II: More advanced plane geometric shapes-triangles, polygons, various rectangles and irregular forms (age 3-5).
- Stage III: Introduction to solid geometric forms and their relationship to plane geometric shapes (age 2-5).
- Study of the basic properties and definitions of the geometric shapes. This is essentially as much a reading exercise as mathematics since the definitions are part of the early language materials.
- Convex and concave polygons.
- Solving problems involving perimeter, area.
- More advanced study of the nomenclature, characteristics, measurement and drawing of the geometric shapes and concepts such as points, line, angle, surface, solid, properties of triangles, circles, etc., including congruence, similarity, equality, and equivalence (continues through age 12 in repeated cycles).
- The history of applications of geometry.
- The theorem of Pythagoras.

- The calculation of area and volume.

## Geography

The Montessori geography curriculum begins with a focus on physical geography, specifically on land and water forms, and the study of biomes. As different continents are introduced, the child learns about the cultures of different countries, along with the ecology, economics, history, and indigenous plants and animals of these different places. The child will make and study political maps of the continents of the world, while also learning the history of mapmaking. The child develops an appreciation for diversity and a respect for all life. The materials kept on hand in the classroom and activities supported with them are described below

### Physical geography:

- The Primary Globes: specially prepared globes for the very young child that isolate single concepts of globe study-how land and water are shown, and the corresponding shapes of the continents that they learned from the puzzle maps (age 3-5).
- Puzzle maps: These are specially made maps in the forms of intricate, color-coded, wooden jigsaw puzzles representing the continents, the countries of each continent, and the states of the U.S. They are presented to the children at an early age, and are at first enjoyed simply as challenging puzzles. Soon, however, the children begin to learn the names of given countries, and by age 6 are normally very familiar with the continents of the globe, the nations of North America, South America, and Europe, along with most of the states of the U.S. As soon as the children can read they begin to lay the puzzle pieces out and place the appropriate name labels to each as a reading and geography exercise (age 3-7).
- Land and water formations: materials designed to help the very young child understand basic land and water formations such as island, isthmus, peninsula, strait, lake, cape, bay, archipelago, etc. At first, they are represented by three-dimensional models of each, complete with water. Then the children learn to recognize the shapes on maps and learn about famous examples of each.
- Transference to maps: Introduction to written names and various forms of maps, along with early study of the flora, fauna, landscapes, and people of the continents.
- Maps and compass: Introduction to longitude and latitude, coordinate position on the globe, the Earth's poles, the magnetic poles, history and use of the compass, topographic maps, global positioning satellite devices, electronic charts.
- An introduction to humankind's search to understand how the Earth was formed, origins, geologic forces, formations of the oceans and atmosphere, continental drift and tectonic plates, volcanoes, earth quakes, the ice ages and the formation of mountain ranges (age 6).
- The study of coasts and land reliefs: hills, mountain ranges, volcanoes, valleys, plains, etc., and their formation, the animal life supported, and effect on people.
- The study of the hydrosphere: ocean, rivers, lakes, and the water cycle (by age 8).

### Cultural geography:

- Countries are studied in many ways at all levels, beginning at about age 3-4. A number of festivals are held every year to focus on specific cultures and to celebrate life together: an

example might be Chinese New Year, when the entire school might study China, prepare Chinese food, learn Chinese dances, and participate in a special dragon dance parade. Anything that the children find interesting is used to help them become familiar with the countries of the world: flags, boundaries, food, climate, traditional dress, houses, major cities, children's toys and games, stamps, coins, traditional foods, art, music, and history. This interweaves through the entire curriculum.

- Study of the regions, culture, and natural resources of the United States, including geography, climate, flora and fauna, major rivers and lakes, capitals, important cities, mountains, people, regional foods, traditions, etc. This begins at age 5 and continues at increasing depth at each level.
- The detailed study of one nation at a time. Focus moves over the years from one continent to another, as the children's interest leads them. All aspects of the nation are considered: geography, climate, flora and fauna, major rivers and lakes, cities, mountains, people, food, religions, etc.

Economic geography:

- Natural resources of the Earth and how they are used by humankind in production processes.
- Imports and Exports: the interdependence of nations.

## **The Earth/Physical Science**

Earth science, in the Montessori curriculum, begins with an overview, and then progresses to detail. The child learns the functioning of the galaxies, the universe, the solar system, the formation of earth, seasons, natural wonders, the weather, rocks and minerals, etc. At the beginning of each academic year, the students are introduced to an impressionistic lesson of how our universe and earth were created. Learning progresses into the different studies, which will sometimes be led by the teacher, and other times will be led by the child and what he or she is interested in learning more about. As the child learns about the discoveries of the past, he or she participates in present discovery through staging practical experiments. The range of topics studied in this curricular area is presented below.

- Life cycles; water, oxygen, carbon-dioxide, and nitrogen (age 7 and up).
- Introduction to chemistry: begins at age 6 and continues throughout the elementary science curriculum.
- The three states of matter.
- Law of conservation of mass.
- Basic atomic theory.
- How elements are created through stellar fusion.
- Elements and compounds.
- Mendeleev's table of the elements.
- Basic molecular theory: building atomic models.
- Physical and chemical changes.

- Research into the elements and continued study of the periodic table.
- Introduction to chemistry lab experiments.
- Development of skills in careful observation, recordkeeping, and description, and the use of increasingly sophisticated techniques of measurement.
- Development of skills using common scientific apparatus: microscopes, telescopes, hand lens, collecting field specimens, dissecting, preparing displays.
- Development of field science skills: tracking, listening, observing.
- Development of scientific inquiry skills: forming hypothesis, designing experiments, and recording results.
- Study of the great inventions; machines and technology and their effect on society throughout history.
- Study of the great scientists.
- Introduction to the physical sciences (age 10-12):
  - Geology and mineralogy
  - Meteorology
  - Astronomy and cosmology
- Elementary physics: light, electricity, magnetic fields, gravity, mass.
- Comparison of length, volume, density, temperature, and other physical properties.
- Preparing and analyzing graphs and data displays; basic statistics.

## **Biology**

The biology study has three main areas of focus. The first area of focus is to discover, to observe, and to experiment with plants and animals, their needs, and variety. The second area of focus is to learn about the evolution of plant and animals. The third area of focus is to learn about the classification of plants and animals. This is a personal journey of discovery, guided by the teacher, wherein children will team for research projects and lessons. Ecology provides a framework for students to bring together all of the details regarding the living world. A list of the range of topics studied in this curricular area is shown below.

- Differentiation between living and non-living things (age 3-4).
- Differentiation between animals and plants; basic characteristics (age 3-5).
- Observation of animals in nature.
- First puzzles representing the biological parts of flowers, root systems, and trees, along with the anatomical features of common animals. These are first used by very young children and puzzles, then as a means to learn the vocabulary, then are related to photos and/or the "real thing," then traced onto paper, and finally with labels as a reading experience.
- Nomenclature cards:



- Botany: identifying, naming, and labeling the parts of plants, trees, leaves, roots, and flowers.
- Zoology: identifying, naming, and labeling the external parts of human beings, insects, fish, birds, and other animals.
- Introduction of the families of the animal kingdom, and identification and classification of animals into the broad families. Introduction to the basic characteristics, lifestyles, habitats, and means of caring for young of each family in the animal kingdom (age 5-7).
- Introduction to ecology: habitat, food chain, adaptation to environment and climate, predator-prey relationships, camouflage, and other body adaptations of common animals.
- Soil composition.
- Advanced elementary biology study: the names and functions of different forms of leaves, 'flowers, seeds, trees, plants, and animals. This usually begins with considerably more field work collecting specimens or observing.
- Study of evolution and the development of life on the Earth over the eons. (Age 6 and up)
- Study of the internal parts of vertebrates: limbs, body coverings, lungs, heart, skeleton, and reproduction (age 5-8).
- Advanced study of plants in class, greenhouse and garden: experimenting with soil, nutrients, light, etc. (age 6 and up).
- More advanced study of the animal kingdom: classification by class and phyla (age 7 and up).
- The plant kingdom: Study of the major families of plant life on the Earth and classification by class and phyla (age 7 and up).
- Animal behavior: detailed observation (age 9 and up).
- Ecology: Advanced study of the interrelationships of life forms (age 9 and up).
- Environmental science and natural resources conservation.
- Hydrologic cycle.

## **History/Social Sciences**

The history curriculum begins with an emphasis on prehistoric life, plants, and animals. The timeline traced begins with the one-celled organism and progresses through the periods and eras to early man. The children are encouraged to research and discover about early life through the making of timelines, researching animals and plants, researching different periods and the plants and animals that lived at that time, how fossils were made, etc.

The curriculum includes the history of early humans, wherein the child is introduced to the earliest hominids, and is given the story of how we evolved. As the child develops, the emphasis shifts to early civilizations, from tribal culture and ancient civilizations to the development of modern cities. The last area of focus in the elementary curriculum is on the child's national and state history. A breakdown of this curricular area follows.

- The basic needs of humans are food, shelter, clothing, defense, transportation, culture, law, religion or spiritual enlightenment, love, and adornment. This study begins at age 5-6 and continues throughout the curriculum.
- The concept of time and historical time is developed through many activities and repeated at deeper complexity from age 5.
- Telling time on the clock.
- Timelines of the child's life.
- Timelines showing the activities of a day, week, month, year.
- Family trees.
- Timeline of the Earth's history.
- Timeline from 8,000 B.C. to 2,000 A.D. to study ancient to modern history.
- The story of the evolution of the planet and its life forms over the eons is first studied at about age 6, along with an overview of human history. This is repeated throughout the curriculum in increasing depth of study.
- Each year the child continues to study and analyze the needs, culture, technology, and social history of various periods in history. The trends of human achievement are charted, such as the development of transportation, architecture, great inventions, and great leaders.
- By age 8, students begin to study the earliest humans, ending with an introduction to the first farmers. They consider early societies in terms of how they organized themselves to meet the common needs of all peoples: food, clothing, shelter, defense, transportation, medicine, arts, entertainment, government, and religion.
- The upper elementary level (ages 9-12) history program follows a 3-year cycle of thematic study. Students study whichever themes are being presented that year regardless of their age. In year 1 of the cycle, the class will focus on the beginning of the universe, formation of the earth, evolution of life, and early human civilizations. These topics were first introduced at the lower elementary level. At this level, students will go into considerably greater depth and prepare increasingly sophisticated projects and research reports.
- Continuing the three-year cycle of thematic history study at the upper elementary level (ages 9-12), in year 2 of the cycle, the class will focus on ancient civilizations, including the Mesopotamian cultures, Greece, Rome, ancient China, Byzantium, ending with an introduction to the Middle Ages.
- In the third year of the three-year cycle of thematic history study at the upper elementary level (ages 9-12), the class will focus on American studies, including an introduction to the history of the United States, American folk culture, technology, children's literature, government, and geography. The class will also consider Pre-Colombian Central and South American cultures, the Native American peoples of North America, the age of exploration, and the immigrant cultural groups who came to America from Europe, Africa, Asia, and Latin America.

## **Arts**

Art is a language. It is a reflection of our understanding of the world as we know it. Arts integration serves as the avenue to a deeper understanding of the lessons. It is a moment to step back from a kaleidoscope of information and assemble that information in a new way, enabling the child to gain a personal perspective on the lessons. In the Montessori classroom, art is woven into the curriculum through dance, movement, drama, literary arts, music, and the visual arts. The Arts are facilitated through group lessons and work that is introduced, then placed in the classroom for further exploration by the child who is ready to inquire deeper with his or her newly acquired skills. In part, the carefully prepared Montessori classroom inspires our students to create. The Montessori classroom incorporates child-written poems, plays that are performed, songs that are sung, and ideas that are expressed through a variety of mediums readily available to each child. Art is not a separate area of the Montessori curriculum; it is an integral component.

Lessons in visual arts, music, drama, and movement are exercises in perception, observation, fine discrimination, and classification that play a major role in helping our children to develop their sense of logic and concentration. They begin at age 3 in a Montessori primary school and are a major area of concentration typically through age 5. Examples are: discrimination of length, width, and height, discrimination of volume, discrimination in multiple dimensions, discrimination among geometric shapes for shape and relative size, discrimination of intensity and nature of sounds, discrimination among musical tones, discrimination of weight, texture and temperature by touch, and discrimination of scents. In the older elementary level students, these skills lead to such exercises as the following:

- Precise observation of the natural world, free-hand drawing: studies from Biology.
- Linear geometric design decoration, artistic composition with metal insets.
- Culinary discrimination.
- Artistic appreciation.
- Architectural appreciation.
- Musical appreciation.
- The scale, reading and writing of music, treble and bass clefs, the major scales.
- Exercises in rhythm, singing, musical phrases.

## **Character and Peace Education (Service Learning)**

Montessori classrooms create a culture of partnership, kindness, respect and peace. The SAPMS will make a conscious effort to organize programs of community service, ranging from our daily interactions with others within our classrooms and school, to community outreach programs that allow children and adults to make a difference in the lives of others. The fundamental idea is one of stewardship. Examples of ways our students may reach out both locally and globally include the following:

- Local community outreach projects.
- Global community outreach projects.
- Community gardening.

- Fund-raising through read-a-thons, potluck suppers, services, etc. for the global relief projects or local charities.
- Collecting and delivering canned goods for local families.
- Donating gently-loved toys to local organizations at Christmas time.
- Adopting a stream/wetland/beach.
- Holiday events at local nursing homes.
- Black Elk's Vision of Peace.
- The Peace Rose Ceremony.
- Building Bridges Out of the Walls.
- The Council of All Beings.
- Owen and Mzee.
- What to Do When Your Beloved Classroom Pet Dies.
- All a Family under One Sky - sharing of cultural and spiritual beliefs to teach and promote understanding and tolerance.
- Creation of a Serenity Corner, a peaceful space.
- The Nothing Work, a calming moment.
- International Peace Site.
- Non-violent communication.

## **Practical Life**

The Montessori primary-level schools encourage children from a very young age to become independent, self-reliant learners. This focus applies academically and to their day-to-day activities. This area of the curriculum focuses on developing skills that allow the child to effectively control and deal with the social and physical environment in which he lives. There is a growing pride in being able to "do it for myself." Practical life begins as soon as the young child enters school and continues throughout the elementary curriculum to more and more advanced tasks appropriate to the oldest students.

Examples of practical life in the elementary classroom include cooking, knitting/sewing, gardening, and taking care of the classroom and living plants and animals that reside there. The older children take an active role in planning their week-long field trip, which coincides with studies in the classroom. The elementary classes also participate in a beginning- and end-of-the-year camping trip, during which they are required to help with setting up camp, cooking and cleaning up after meals, packing their own belongings, and the striking camp under the supervision of chaperones and teachers. The camp-out at the beginning of the year is intended to help the children bond as a learning community and to get comfortable with one another and their teachers. The year-end camp-out is a culmination of the year, where children and families come together to celebrate the joy and discoveries of the year and to honor children who are graduating and taking the next step in their lifelong path of learning.

Examples of early tasks for 3-5-year-olds include pouring liquids without spilling, carrying objects without dropping, walking without knocking into furniture or people, using scissors with good control, using simple carpentry tools, putting materials away on the shelves where they belong when finished, dusting, polishing and washing items, sweeping, flower arranging, caring for plants and animals, table manners, folding cloth napkins, using common household tools, simple food preparation, weaving, bead stringing, etc. This process continues logically so that older students will learn such practical tasks as the following:

- Caring for animals.
- Sewing.
- Working with tools.
- Making simple repairs.
- Getting around on their own: buses, cabs, walking safety.
- Making consumer purchase decisions, comparison shopping, and budgeting.
- Maintaining a checkbook.
- Earning spending money.
- Mastering test-taking strategies.
- Caring for young children.
- Interior decorating.
- Furniture refinishing.
- Wilderness survival.
- Running a small business enterprise.
- Gardening.

## **Health and Physical Education**

Individualized physical education includes the following:

- Anatomy: Systems of the animal and human body (age 9 and up).
- Health and nutrition (age 9 and up).
- Group yoga and movement
- Cooperative games

### **I.4.B. Research Base and Foundation for the Montessori Curriculum**

The literature used for both the educational program design and the curriculum plan is presented in **Section I.3.C. Research Base for Montessori Education: Literature Cited** on page 18. The works cited there are wholly incorporated into this section of the SAPMS charter application by reference.

### **1.4.C. Reading Curriculum**

The reading program will be a primary focus at the SAPMS and will be consistent with the Sunshine State Standards and Common Core. The Montessori reading program has been used to teach children to read for 100 years and is grounded in scientific reading research. It has been proven effective through its use in thousands of schools around the world, both public and private. For those students reading below grade level, the Montessori environment will be supplemented with the Reading Recovery program.

### **Reading and Language Arts**

The SAPMS's Montessori environment will provide for rich and precise language development by allowing each child to discover and explore these properties themselves. The reading program at the Public Montessori School will be a primary focus and will be consistent with the Sunshine State Standards. The Montessori classroom materials for Reading and Language Arts make up the bulk of the Montessori prepared reading and language environment. These materials have been scientifically designed and tested.

As mentioned previously, for those students reading below grade level, the Montessori environment will be supplemented as needed with the Reading Recovery program. We will use these instruction methods to focus on the student's reading accomplishments using constant feedback and progress monitoring so that students feel successful in their achievements. The Montessori curriculum provides many challenging opportunities for advanced level readers.

The following discussion presents a brief overview of the core curriculum in the areas of reading and language arts.

### **Pre-reading**

The total environment of a Montessori primary class (3 to 6 years old) creates and reinforces in young children a spontaneous interest in learning how to read. The curriculum encourages them to love learning about reading and stories with activities such as singing, finger play, children's nursery rhymes, and music. Montessori primary students normally develop a highly sophisticated vocabulary and command of the English language. They are taught through many early approaches to listen for and recognize the individual phonetic sounds in words. They are introduced to literature by reading aloud and discussing a wide range of classic stories and poetry. Even the youngest students recognize the shape and phonetic sounds of the alphabet through "sandpaper letters," a tactile alphabet. All of this early training creates the basis for the Montessori reading program in the elementary years.

### **Reading**

- The development of the concept that written words are actual thoughts set down on paper.
- Sounding out simple three or four-letter phonetic words.
- Early exercises to practice reading and to gain the concept of a noun: labeling objects with the written name tags, mastering increasingly complex words by naming things that interest them, such as dinosaurs, the parts of a flower, geometric shapes, the materials in the classroom, etc.
- Learning to recognize verbs: exercises in which the child reads a card with a verbal "command" printed out (such as run, sit, walk, etc.) and demonstrates his understanding by acting it out. As the child's reading vocabulary increases, verbal commands involve full sentences and multiple steps: "Place the mat on the table and bring back a red pencil."

- Reading specially selected or prepared small books on topics that really interest the child, such as in science, geography, nature or history.
- Interpretive reading for comprehension at ever increasing levels of difficulty.
- Regular use of reference books for both research and pleasure.
- An introduction to the world's classical children's literature at increasing depth and sophistication.
- Daily times set aside just for reading.

### **Handwriting**

Control of the hand in preparation for writing is developed through many exercises including specially designed tasks in the use of the pencil. Montessori-schooled children will practice making letters from the time of their initial interest in writing at age 3 or 4. This training leads to the use of “moveable alphabets,” which are easily manipulated wooden letters used for the early stages of phonetic word creation, the analysis of words, and spelling. These materials will be used at SAPMS to facilitate early reading and writing tasks during the period when young children are still not comfortable with their own writing skills. Even before the children are comfortable in their handwriting skills, they spell words, compose sentences and stories, and work on punctuation and capitalization with the moveable alphabets.

The SAPMS will establish an open writing center to introduce the children to and encourage them to try various forms of writing.

- At first, by tracing letters into sand.
- Later, by writing on special tilted, upright blackboards: unlined, wide-lined, and narrow-lined.
- Later, by writing on special writing tablets, becoming comfortable with script.
- Cursive writing (typically around age 5).

### **Composition**

At an early age, before handwriting has been mastered, the children will compose sentences, stories, and poetry through oral dictation to adults (teachers, teacher's aides, volunteers, parents, etc.) and with the use of the moveable alphabet. Once handwriting is fairly accomplished, the children will begin to develop their composition skills. They will continue to develop these skills over the years at increasing levels of sophistication through the following activities.

- Preparing written answers to simple questions.
- Composing stories to follow a picture series.
- Beginning to write stories or poems on given simple themes.
- Preparing written descriptions of science experiments.
- Preparing written reports.
- Learning how to write letters.

By age 9, research skills and the preparation of reports will become major components of the educational program at the SAPMS. Students will research areas of interest or topics that have been assigned in depth, and prepare formal and informal, written and oral reports.

Creative and expository composition skills continue to develop as the children advance from level to level. Students will be typically asked to write on a daily basis, composing short stories, poems, plays, reports, and news articles.

### **Spelling**

Children will begin to spell using the moveable alphabet to sound out and spell words as they are first learning to read. They will “take dictation,” spelling words called by the teacher as a daily exercise. The sequence of spelling, as with all language skills, will begin much earlier and continue throughout their education. Some of the activities that will be used in this curricular area are as follows:

- Learning to sound out and spell simple phonetic words.
- Learning to recognize and spell words involving phonograms, such as ei, ai, or ough.
- Developing a first “personal” dictionary of words that they can now spell.
- Learning to recognize and spell the “puzzle words” of English: words that are non-phonetic and are not spelled as they sound.
- Studying words involving compound words, contractions, singular and plural, masculine-feminine words, prefixes, suffixes, synonyms, antonyms and homonyms.

### **Grammar**

The study of grammar will begin almost immediately after the child learns to read, during the sensitive period when he or she is spontaneously interested in language. It continues over several years until mastered. The idea is to introduce grammar to young children as they are first learning how to put thoughts down on paper, when the process is natural and interesting, rather than waiting until the student is much older and finds the work tedious.

The SAPMS will introduce our children to the function of the parts of speech one at a time through many games and exercises that isolate the one element under study. Montessori has assigned a geometric symbol to represent each element of grammar. For example, verbs are represented by a large red circle. The children analyze sentences by placing the symbols for the appropriate part of speech over each word.

Once students have mastered the symbols for the parts of speech, they will perform more advanced exercises for several years with grammar boxes set up to allow them to analyze sentences by their parts of speech. Simple and compound sentences, clauses, verb voices, and logical analysis of variously constructed sentences are studied using many different hands-on materials and exercises. This normally begins about age 5 and continues over several years.

Students will continue their study of language from the early elementary years onward, reviewing as well as engaging new concepts and skills: tenses, moods, irregular verbs, person and number, the study of style, the study of grammatical arrangements in other languages.

### **I.4.D. Exceptional Students and the Montessori Curriculum**

As also discussed in **Section I.2.A. Anticipated Student Population (F.S. §1002.33)** on page 5, students of all abilities, from those with learning disabilities to those who are gifted, can be equally successful in the



Montessori environment. The goal of the Exceptional Child Education program at SAPMS will be to assist students in meeting their educational objectives and needs, as described in their IEPs and to help them master the Montessori curriculum.

SAPMS will work with the guidance of the SJCSO to identify the special needs of our students and to meet all applicable federal, state and local policies and procedures; specifically, the Individuals with Disabilities Education Act (IDEA), Section 504 of the Rehabilitation Act of 1973, Section 1002.33 of the Florida Statutes, HB403, and Chapter C6A-6 of the Florida Administrative Code. This includes, but is not limited to the following:

- A non-discriminatory policy regarding identification, location, evaluation and student selection.
- Free appropriate public education (FAPE).
- Individual education plans (IEPs) including an IEP meeting with the student's family.

Montessori is a hands-on learning curriculum that has been proven successful with students who have difficulties learning, those who are average, and those who are above average. This type of independent of learning allows the teacher to individualize the program to meet the needs of each student. This type of learning and curriculum along with its possibilities for exploration also will provide gifted children with many opportunities for growth in reading and other subject areas. Dr. Maria Montessori actually began her work in Rome with children of special needs. It was after their academic success that she went on to expound on her program and develop her Montessori Method of education for all students.

Children with special needs will be addressed on an individual basis as they apply and will be afforded an equal enrollment opportunity. The IEP team will review each student's IEP and special services before enrollment. Because of the SAPMS's small size, we will not have any separate classrooms or extra assistants dedicated to special needs students. Therefore, these students must be able to be served in the same classroom as regular students and be able to fit within the Montessori mode of teaching.

Our model for ESE students will be the inclusive model. Our IEP team will evaluate the student's needs on a regular basis, at least annually. The IEP team will meet to determine if a student's special needs can be met at SAPMS or if they can be better served at another school. An SJCSO staff member should be part of the decision making process.

Students with disabilities will be educated in the least restrictive environment, and will be referred only if the nature and severity of the disability is such that education in regular classes with the use of supplementary aids and services cannot be satisfactorily achieved. We will make every effort to provide appropriate services to students with individual education plans. SAPMS will contract with the SJCSO District where possible, and will otherwise seek certified private providers. The SAPMS recognizes that our professional responsibility as educators includes placing students in an environment where they can flourish. Therefore, those students whose special needs cannot be adequately addressed at SAPMS will be appropriately referred. SAPMS staff will work together with SJCSO personnel to ensure that the needs of these children are met.

Parents of students with disabilities will be afforded procedural safeguards in their native language, which include the areas of notice and consent, independent educational evaluations, confidentiality of student records and due process hearings. SAPMS is committed to working with these teams to offer a program of instruction best suited to the needs of the child according to the recommendations of the team.

#### **I.4.E. Montessori Curriculum in Areas Other than Core Academics**

In the Montessori Method of education, the curriculum areas that are characterized as “other than” the core academic areas in the charter application are not separated from the “core areas” in the Montessori classroom. SAPMS will integrate the following subjects into the core curriculum, as described in **Section**

**I.4.A. Core Curriculum** beginning on page 22:

- The Arts: music, visual arts, literary arts
- Health and Physical Education: yoga, dance, and movement; nutrition; systems of the animal and human anatomy
- Practical Life
- Character and Peace Education (Service Learning)
- Environmental Science and Stewardship

#### **I.4.F. Evaluating the Effectiveness of the Montessori Curriculum**

The success of SAPMS will be evaluated based on the achievement of the following elements of Montessori program approaches:

- The School is designed to attract a broad range of students that represent the diverse student body throughout the school district. Program designs are focused on student learning styles that include the facilitation of learning, as required by the Montessori Method of teaching.
- The curriculum focuses on student achievement and specific achievement goals, on a set schedule with defined consequences, with curricula aligned with Florida state standards and specific approaches to translate these standards into instructional practice.
- The Montessori program at SAPMS is being developed with the American Montessori Society (AMS) and/or Association Montessori Internationale (AMI) certification requirements.
- AMS/AMI-certified teachers who are considered highly qualified will be recruited.
- Program personnel are committed to data-driven decision-making and instruction. The Montessori program administrative staff will provide early and ongoing assessment data to teachers and the principal. Assessment data will be used to diagnose teacher and student weaknesses and make improvements.

SAPMS will use a process of reporting student progress that is compatible with Montessori and includes parent conferences and authentic assessment tools such as observation, portfolio, performance assessment with rubric, etc. At the same time, SAPMS will implement the state-mandated assessments in such a way that the character of the Montessori program is not compromised. Montessori education recognizes three stages of learning:

1. The introduction to a concept through a lesson, lecture, something read in a book, etc.
2. The processing of information and developing an understanding of the concept through work, experimentation, and creation.
3. Knowing or possessing an understanding of the information, which is demonstrated by the ability to pass a test with confidence, to teach another, or to express the concept with ease.

The integrated curriculum promotes the ability of a child to be indirectly preparing for a new discovery while engaged in learning something else, making education a joyful discovery.

Each child's development is constantly observed and recorded by the teacher. These observations are made on both the level of concentration of each child, and the introduction to and mastery of each curricular lesson. What the teacher observes in the child is documented in writing and used in creating each child's daily work plan for school. These documented observations are also used to communicate to the student and his/her parents the child's progress in each area of the curriculum. Through these means, all constituents are able to know what lessons have been introduced, practiced, and/or mastered by the child.

SAPMS will place an emphasis on students' learning of the core curriculum and on high educational standards. Our goal is for all of our students to score a passing grade on state-mandated tests. Additionally, our teachers at every grade level will actively participate in ongoing individualized assessment through observation and documentation of student progress toward curricular benchmark goals to monitor student achievement as it corresponds to both the Montessori curriculum and the Florida standards. While we value the differences in each child and honor individual strengths and learning styles, our goal is for every student at SAPMS to be functioning at or above grade level in each subject area. Therefore, we are committed to providing individualized learning plans for each child in accordance with the Montessori teaching and learning philosophy.

SAPMS will seek accreditation with either the American Montessori Society (AMS) or the Association Montessori Internationale (AMI) and the North American Montessori Teachers' Association (NAMTA). These accreditation processes are comprehensive, require resources and will take several years to achieve. With these goals in mind, SAPMS will use the accreditation standards of these organizations in planning our assessment procedures.

According to AMS, a Montessori school is successful in meeting this standard when it uses a comprehensive assessment system based on clearly defined outcomes measures. The system is used to assess student outcomes on expectations for student learning to evaluate the effectiveness of curriculum and instruction and determine interventions to improve student learning. The assessment system yields timely and accurate information that is meaningful and useful to school leaders, teachers, and other stakeholders in understanding learner outcomes, school effectiveness, and the results of improvement efforts.

In seeking to achieve the AMS standards for documentation and use of results, SAPMS is committed to the following:

- Enacting a comprehensive assessment system that monitors and documents outcomes and uses these results to improve learner outcomes and school effectiveness.
- Establishing measures for outcomes of student learning that yield information that is reliable and bias free
- Developing and using a comprehensive assessment system for evaluating progress toward meeting the expectations for student learning across age levels which may include research based assessment tools
- Using student assessment data in making decisions that impact continuous improvement of teaching and learning processes.

- Conducting a systematic analysis of instructional effectiveness and use the results to improve student learning.
- Maintaining a secure, accurate, and complete student record system in accordance with state and federal regulations.
- Communicating the results of learner outcomes and school effectiveness to all stakeholders.
- Using comparison and trend data of learner outcomes from comparable schools in evaluating its effectiveness.
- Demonstrating verifiable growth in learner outcomes.

An AMI Certificate of Recognition offers credibility to a school's status within the educational community as a whole, as well as within the Montessori community. It also confirms a staunch support of Montessori principles faithfully put into practice. To be considered for AMI/USA Recognized School Status, SAPMS must comply with the following:

- An AMI-trained teacher at the appropriate age level for each class.
- A consultation by an AMI-trained consultant once every 3 years.
- A complete set of materials for each class from a manufacturer authorized by AMI.
- A philosophical approach consistent with what is given in AMI training courses.
- Classes made up of children representing a 3-year age range. In elementary school, these are grouped as ages 6-9 years and 9-12 years.
- Between 28-35 children in each class including a well-balanced division of ages to ensure social development.
- Morning sessions five days per week for the full class, with an afternoon session (extended day) consisting of two to three hours of Montessori activities for the older children in the primary classes.
- An uninterrupted 3-hour work cycle each morning.
- No more than one aide in each primary classroom.

Parent, student and teacher surveys also will be used to evaluate the effectiveness of the Montessori curriculum. The program will be considered successful when at least 75 percent of students and teachers respond favorably and at least 60 percent of parents of Montessori students respond favorably to an annual survey.

## I.5. Student Performance, Assessment, and Evaluation

### **Evaluation Criteria:**

*Reviewers will look for:*

- *Measurable educational goals and objectives that set high standards for student performance.*
- *Promotion standards that are based on high expectations and provide clear criteria for promotion from one level to the next, and for graduation (if applicable).*
- *Evidence that a range of valid and reliable assessments will be used to measure student performance.*
- *An assessment plan that is sufficiently frequent and detailed to determine whether students are making adequate progress.*
- *Evidence that data will inform decisions about adjustments to the educational program.*
- *Plans for sharing student performance information that will keep students and parents well informed of academic progress.*

### **I.5.A. Evaluating Student Progress**

The curriculum goals and objectives will be performance-based in keeping with Florida's Sunshine State Standards, and both results and processes will be emphasized. At the same time, the interdisciplinary Montessori curriculum encourages students to demonstrate inquiry skills and learn how to synthesize across subject areas. Students will be evaluated in the goal areas including content mastery, intellectual growth, emotional development, and physical development.

Content goals include the following:

- An understanding of the evolution of life and a feeling of responsibility toward aiding further evolution.
- An understanding that all humans have the same basic needs and an appreciation for the variety of ways in which those needs are met.
- An awareness of the interdependence of humans and nature, with a responsible feeling toward an ecological whole.
- An awareness of the interdependence of human and nations, with a desire for cooperation and peace. The skills necessary to succeed later on in school and in life.

Intellectual skill goals for SAPMS students include the following:

- The mastery of the necessary tools or skills (such as reading, writing, etc.) needed to research, organize, evaluate, and synthesize information.
- Inquisitive and self-directed learners who are intrinsically motivated, capable of forming their own questions, adept at assessing broad range of resources available to them to uncover answers, and able to think flexibly in finding answers.
- Initiative to choose work that is challenging and interesting to the child.
- Ability to express their understanding and learning in response to multiple forms of assessments including essays, self-reflection, standardized tests, presentations, creative performance, art, and technical models and demonstrations.

Emotional skill goals include the goal that every child has a positive self-image, as projected through the following:

- Each child's awareness of his or her one's own feelings, strengths, opportunities for growth and learning styles.
- Sensitivity to and consideration for the feelings of others.
- The capability of understanding others' perspectives different from their own.
- An awareness of how one's emotional state affects others..

Physical skill goals for SAPMS students include the following:

- Gross motor mastery and control.
- The fine motor coordination necessary for writing and manipulation of materials.

SAPMS recognizes that teachers must translate the State standards into a set of measurable outcomes against which the students are regularly assessed. The descriptions of the planned elementary curriculum (see page 9 and page 22) gives a brief overview of the goals of each subject area and the Montessori goals the School intends to teach to mastery, but the list of specific day-to-day and week-to-week measurable objectives will be created annually by the teachers.

### **I.5.B. Student Placement and Promotion**

Montessori classrooms are multi-age environments. Students usually remain with their teacher for a period of 3 years. During these 3 years, students can be retained, placed, or promoted. At the end of an academic year, teachers make decisions based on how well students are progressing through the Montessori curriculum and the Florida State Standards.

If a student is not meeting the grade level standards, a teacher may decide to retain a student at his current grade level. At SAPMS, our belief is that the most effective intervention for a child who is struggling to meet grade-level standards is quality differentiated instruction, individualized targeted support, and a comprehensive response to intervention system. There is little research supporting retention as an effective intervention in accelerating learning. In fact, most research demonstrates that retention is an ineffective intervention, and that students who are retained are more likely to have lower levels of proficiency, GPAs, attendance rates, and graduation rates.

The Montessori model is designed to individualize instruction and differentiate support through developmentally appropriate practices. Every child receives an individualized learning plan that is developed to capitalize on a child's unique interests and strengths and address a child's unique needs. Because children are learning in multiage classrooms settings, they are given three-year cycles to demonstrate mastery. Multiple years in a given classroom enable children to develop strong relationships with the adults, become proficient in their communities and in their learning environment, and feel comfortable in a wide range of skills, abilities, and developmental phases. In addition, when a child might truly benefit from another year in a given classroom, because some students remain and some move on from each class every year, the stigma of staying is negated.

At SAPMS, decisions about whether a child should move forward from lower elementary to upper elementary and onto Middle School will be decided case by case in the best interest of the child. This decision will be made collectively by teachers, families, the child when appropriate, and SAPMS leadership. That said, the School understands the consequences of sending an over-aged child to middle school and will make it a priority to ensure every child is prepared to go to the seventh grade before the age of 13.

Children are placed in a classroom on the basis of gender, race, ability, space and grade. The teachers as well as administrative staff determine placement of students. Once placement assignments are complete, students will be invited to participate in a school-wide transition day to meet their new teacher(s) and classmates. Changes to classroom assignments will not be granted once the placement process is complete.

### **I.5.C. School Graduation Requirements**

This section of the school charter application is not applicable to the SAPMS, which will serve children ages 6-12.

### **I.5.D. Use of Baseline Student Data**

The School's plan for assessing student performance includes obtaining information from attendance patterns, standardized tests, and academic screenings administered during the first 60 days of enrollment. The SAPMS will include in the application packet for each student a Request for Cumulative School Records Form for parents to sign. This form will then be submitted to the SJCSO so that we may obtain student performance data for each of the students enrolling from the district school system.

The Sunshine State Standards will be used as the primary framework for determining standards of achievement. For example, when available, information from the criterion-referenced portion of the FCAT will demarcate strengths and weaknesses within the core subjects of Reading and Mathematics. In grades below 4, information on the individual skill areas will be gathered through academic screenings administered during the first 60 days of enrollment and will be used to create a personalized education plan for each student.

Goals will be set to meet or exceed the average percentage of progress achieved among comparable student populations within the SJCSO. Methods of measurement will include testing, portfolio assessment, observations and data tracking. Outcomes will be judged against the Sunshine State Standards and Common Core learner expectations also known as "benchmarks," achievement of skills taught in the Montessori academic and social curriculum, and effort toward goals on student/teacher/parent contracts. Each area will be evaluated according to short and long-term criterion pre-established in IEPs.

A goal of the School is for students to advance at a rate comparable to other SJCSO students. The School will follow guidelines set by the Sunshine State Standards and Common Core. The School will work with the District staff to identify comparable student populations based on criteria including such areas as the following:

- Free/reduced lunch
- Minority/majority population
- Grade levels
- Comparable school size

Once these comparable student populations have been identified, the School will work with SJCSO staff to complete appropriate comparisons and derive conclusions from this data.

### **I.5.E. Student Progress in the Montessori Curriculum**

Montessori schools teach children to become active participants in their own development, strongly influenced by natural forces leading toward growth and learning. Instruction is designed to help children realize their full potential as intelligent, creative whole persons.

#### **Alternative Performance Indicator Methods**

The Montessori approach to learning involves children in activities designed to help them interrelate and critically analyze ideas, form questions about these ideas as a spur to further study, and generally engage in meaningful mental exercise, instead of concentrating on isolated facts and surface knowledge. To effectively evaluate student progress under these conditions, AMS advocates that teachers should use, in addition to written tests, other formats such as portfolios, presentations, and multimedia projects that more authentically gauge children's ability to interrelate ideas, think critically, and use information meaningfully. Student assessment should both measure the effectiveness of an educational program and reveal growth and difficulties experienced by the student. AMS research has revealed the following:

- The human brain learns by wrestling with ambiguity, solving problems, questioning, and discovering patterns, not by memorizing isolated information.
- Assimilating new information happens most effectively when that information comes by way of challenging, complex, interactive experiences.
- As each new experience is encountered, questioned, analyzed, and assimilated into existing frameworks, the actual physical structure of a person's brain changes.
- The neo-cortex, that part of the brain in which information is processed and stored, functions best in a relaxed but challenging atmosphere.

The founding team of SAPMS believes that assessments should inform instruction and curriculum, and that assessments must drive accountability towards student learning and growth. That said, the founding team also believes that there must be multiple forms of assessment and, that like learning styles, different children excel on different forms of assessment. Just as the adults are responsible for determining how to move a child to high levels of achievement and performance, adults also must have a diverse set of assessments by which a child can demonstrate levels of learning.

SAPMS's commitment is to ensure that every child is prepared for the middle school of their choice, knows how to demonstrate his or her level of preparation, are able to advocate for themselves, and are able to "learn" and "practice" an assessment form that is more challenging for them. The School also believes that, for children to prepare for the future, they must be flexible learners and thinkers. The ability for children to demonstrate and to present what they know and you can do is an important skill for success.

While the founding team believes that the most powerful assessments a teacher uses are his or her own informal and ongoing assessments, the School will make use of effective and accountable formal assessment systems to ensure all students are making adequate and consistent growth on multiple objective measures and to inform the teacher's daily assessment systems. The goals will be specific, measurable, attainable, results-based, and time-bound to ensure that school improvement efforts are practical, motivating and realistic. Performances on these measures, taken together, will indicate each child's progress toward "meeting statewide standards," as required by law, though no one measure alone will constitute a sole indicator of satisfactory or unsatisfactory progress. The founding team recognizes



that the State of Florida has adopted the Common Core Standards, and in alignment with the Department of Education's timeline, SAPMS will align with the Common Core Standards as well.

### **Qualitative Assessment**

Rating forms, checklists, and narrative descriptions will be used to provide student and parent with comprehensive feedback on personal, social and academic development. Variables that will be considered include the following:

1. Positive attitude toward school.
2. Inner security and sense of order.
3. Pride in the physical environment.
4. Abiding curiosity.
5. Habit of concentration.
6. Habits of initiative and persistence.
7. Ability to make decisions.
8. Sense of independence and self-confidence.
9. Self-discipline.
10. Sense of responsibility to other members of the class, school, and community.

Students will be qualitatively assessed on the development of habits for a life-long learner: academic competency; a willingness to work hard and meet challenges; recognition of the relationship between efforts and outcome; confidence and security with skills; an ability to acquire the knowledge needed to meet personal objectives; and a sense of responsibility and caring for others and the community. SAPMS will not offer grades or other forms of reward or punishment, subtle or overt. Student qualitative assessment will consist of a number of different alternative assessment tools such as the following:

1. Documented observations by teachers and staff of behaviors that indicate the student's personal, social, and academic development.
2. Demonstration through oral and written tools of mastery of knowledge and skills with specific instructional material.
3. In-class performance of work documentation.
4. Student work portfolios.
5. Documented evidence of work habits carried out during school hours.

Parents will receive a Student Progress Report four times per year: October, December, March and June. Parent-teacher conferences accompany the October and March reports, and either parents or guardians are expected to attend each conference, observing their child's classroom sometime before the second conference in March. All student documentation will be by teacher portfolio and will include the teacher's observations and record keeping. Appendix B provides an example of the type of checklist that will be used to track student progress.

## **Individualized Work Plans**

Montessori teachers are trained to develop individualized work plans for each child. Each child will have an active role in defining their work plan and will monitor his or her own work in that plan on a progress sheet. The teacher and child will meet regularly to ensure progress is being made on the work plan. As part of this process, teachers lead children in selecting work to go into their portfolio. They collect evidence of performance in their portfolio with their self-reflections on the work and completed rubrics. Children will be coached to communicate intelligently about their current level of performance, how they feel about the work they did, and what they learned to their families to other students, and to teachers.

On a day-to-day basis, each student will keep a work record or plan that will be reviewed by the Montessori classroom teacher and sent home on a regular basis for parent/guardian review. Periodically, teachers will assess student progress via benchmarks. Parents will be kept abreast of their child's progress through progress reports and conferences.

There will be two mandatory parent/teacher/student conferences to determine future goals. The first conference will be held at the beginning of the school year to review student and parent contracts and set initial goals. The faculty, with the assistance of each student and parent, will prepare an IEP for each student. The second conference will be held at the beginning of the second semester to review progress accomplished during the first semester and then to set goals for the remainder of the year.

## **Formative Evaluations**

In addition to the required standardized testing, the SAPMS will evaluate the educational strengths and needs of students using such methods as performance assessments like oral presentations and demonstrations; product assessments like science projects, art exhibits, design projects, and portfolios; and process-focused assessments like interviewing, work plans, and observations. Formative evaluations will be conducted frequently and will be used to assist teachers in determining how the student is progressing on a day-to-day basis and will allow the teacher to develop lessons that guide the student in acquiring the skills needed. Most of the formative evaluations will be done through teacher observation and evaluation. Summative evaluations will be conducted periodically and will be used to evaluate progress the student is making over time and used to report student progress of skills to parents.

## **Mandated State Testing**

SAPMS will participate in state-mandated testing and conduct the testing as appropriately as possible within the Montessori philosophy. By the end of each 3-year cycle in the Montessori classroom, SAPMS students will have covered all State Standards for the three grade levels completed, and will be capable of meeting or exceeding the generally very good District average testing results in all content and standard areas.

SAPMS will participate in the required Florida Statewide Assessment program, including the components of the Florida Comprehensive Assessment Test (FCAT) and any changes or additions made during the contract period. Faculty will plan, with representatives of the SJCS, the alignment of testing with that planned for the district's schools, which will include the Florida Competency Assessment Test (FCAT).

Accordingly, all assessment data will be captured in the children's report cards. The report card will monitor growth in all areas to ensure the School is documenting the performance of the whole child. All student data will be recorded into the assessment database to ensure performance on multiple assessments is captured. Teacher notes and observations, performance on criterion-referenced

assessments, growth on formative assessments, children's reflections on their own growth, performance in their portfolios, teacher rubrics, and work plans will be recorded in one system to ensure the report card is indeed summative and includes data from multiple assessments.

### **I.5.F. How Student Progress Informs Work in the Montessori Method**

Because Montessori believes in individually paced academic progress, most schools do not assign letter grades or rank students within each class according to their achievement. Student progress, however, is measured in different ways, which may include the methods described below.

#### **Student Self-Evaluations**

At the elementary level, students will prepare a 3-month self-evaluation of the past three month's work: what they accomplished, what they enjoyed the most, what they found most difficult, and what they would like to learn in the three months ahead. When completed, they will meet with the teachers, who will review it and add comments and observations.

#### **Portfolios of Student Work**

Two or three times a year, teachers, students at the elementary level, and parents go through the students' completed work and make selections for their portfolios.

#### **Student/Parent/Teacher Conferences**

Once the students' three-month self-evaluations are complete, parents, students, and teachers will hold a family conference two or three times a year to review their children's portfolios and self-evaluations and go through the teachers' assessment of their children's progress.

#### **Narrative Progress Reports**

At SAPMS, once or twice a year, teachers will prepare a written narrative report discussing each student's work, social development, and mastery of fundamental skills.

#### **Action Related to Setting up Data-Driven Decision-Making**

Teachers will use achievement data as a tool to help them improve instruction, diagnose students' specific instructional needs, and increase student learning/achievement. Data will be given to Montessori teachers and principals at regular intervals from the start of the academic year, along with training in the use of these data to diagnose areas of weakness.

Students will be assigned to Montessori classes that are most beneficial to them based on assessment data. This practice will also increase the odds that disadvantaged and minority students will be able to qualify for high-level classes.

The results of these state assessments will be an indicator of overall school wide performance, class performance, grade-level performance, and subgroup performance. These tests will be one of multiple assessment methods used to document and monitor student growth on a continuum of achievement.

SAPMS plans to facilitate an annual summer retreat where the teaching staff will map all the standards, prioritize those to teach to mastery, break down the standards into measurable objectives, and then sequence those objectives into a year-long plan. This sequenced plan listing all the measurable objectives in every subject area will be what drives the School's assessments. Teaching teams will be provided regular, dedicated time to review their sequenced plans, align those plans with the diagnostic

assessment data of their students, and develop plans to differentiate teaching and support for children based on where they are and where they need to be.

### **I.5.G. How Student Progress is Shared with Students and Parents**

Student work records will be sent home on a regular basis for parent/guardian review. Periodically, teachers will assess student progress via Montessori benchmarks. Progress reports will be sent and conferences held. Parent-Teacher conferences may include student input in the forms of self-evaluations/participation. SAPMS will also communicate with parents via newsletters, parent education, and other school events.

SAPMS has a goal of every family having access to student performance data. The founding team believes that effective schools are often those in which families and the community have the means to advocate for their children and hold the school accountable. The School welcomes that level of advocacy and thinks that that ability begins with access to data and information. At the beginning of every school year, the School will hold family meetings to share its assessment philosophy. Until families are able to access their children's information on a computer system, the School will hold family accountability sessions throughout the year to share school-wide progress and regular family meetings about individual student progress.

SAPMS will continuously review academic content and instruction in light of the data produced in accordance with this section, and will make improvements in curriculum, instruction and professional development as appropriate. To this end, a school improvement plan will be developed each year with input from the School's community, staff, and board.

Charged with stewardship of public school funds, the SAPMS will systematically review the schools' data to monitor trends in student learning outcomes and ensure that there are sufficient and appropriate financial and human resources to properly enact the School's program and remain true to the charter. SAPMS will comply with all state and federal laws regarding reporting requirements for students with IEPs.

## **I.6. Exceptional Students**

### **I.6.A. Level of Service**

The school will serve students with disabilities whose needs can be met in a regular classroom environment (at least 80 percent of instruction occurring in a class with non-disabled peers) with the provision of reasonable supplementary supports and services and accommodations.

### **I.6.B. Providing Equal Opportunity for Enrollment**

Section 504 provides: "No otherwise qualified individual with a disability in the United States... shall, solely by reason of her or his disability, be excluded from the participation in, be denied the benefits of, or be subjected to discrimination under any program or activity receiving Federal financial assistance..."

Students with disabilities will be educated in the least restrictive environment, and will be referred only if the nature and severity of the disability is such that education in regular classes with the use of supplementary aids and services cannot be satisfactorily achieved. We will make every effort to provide appropriate services to students through IEPs. The District will provide District staff to assist SAPMS with IDEA and ESE compliance. It is our professional responsibility as educators to place students in an environment where they can flourish. Therefore, those students whose special needs cannot be

adequately addressed at SAPMS will be appropriately referred. SAPMS staff will work together with District personnel to ensure that the needs of these children are met.

SAPMS staff will work closely in the early stages with District staff to discuss the services that the students with disabilities need. Parents of students with disabilities will be afforded procedural safeguards in their native language, which include the areas of notice and consent, independent educational evaluations, confidentiality of student records and due process hearings. It is recommended that SAPMS use District forms for all IEP cases. SAPMS is committed to working with these teams to offer a program of instruction best suited to the needs of the child according to the recommendations of the team.

### **I.6.C. Ensuring Proper Placement of Students with Disabilities**

SAPMS will work with the guidance of the St. Johns County School District to identify the special needs of our students and to meet all applicable federal, state and local policies and procedures; specifically, the Individuals With Disabilities Education Act (IDEA), Section 504 of the Rehabilitation Act of 1973, Section 1002.33 of the Florida Statutes, and Chapter C6A-6 of the Florida Administrative Code. This includes, but is not limited to, the following:

- A non-discriminatory policy regarding identification, location, evaluation and student selection.
- Free appropriate public education (FAPE)
- IEPs including an IEP Meeting with the student's family, which also includes those students who are gifted.

The District will assign an ESE program specialist to work with SAPMS. After review the IEPs, SAPMS will make use of assistance from the District ESE Department as needed to ensure compliance.

### **I.6.D. Adapting School Facilities to ESE Students**

As discussed in previous sections, children with special needs will be addressed on an individual basis as they apply and will be afforded an equal enrollment opportunity. The IEP team will review each student's IEP and special services before enrollment. Because of our small size, we will not have any separate classrooms or extra assistants dedicated to special needs students. Therefore, such students must be able to be serviced in the same classroom as regular students and be able to fit within the Montessori mode of teaching.

Our model for ESE students will be the inclusive model. Our IEP team will evaluate the student's needs on a regular basis, at least annually. The IEP team will meet to determine if students' special needs can be met at SAPMS or if they can be better served at another school. An SJCS staff member should be part of the decision-making process. The SAPMS will have a staff member with ESE certification to participate in IEP meetings, to work with student directly, or consult with the teachers on meeting the student's needs and to write IEPs. These staff also will manage annual re-evaluations.

For those students with speech and language IEPs, a speech-language pathologist will be required to provide therapy or consultation. The SAPMS will provide ADA accessibility to the campus for students with mobility impairments, and the school will accommodate any specialized equipment that a student will need. As a public school, we are required to provide equipment needed for any child to receive FAPE. Equipment will be requested through our school funding, business partners, or grants.

### **1.6.E. Evaluating the School's ESE Program Effectiveness**

ESE students are included in the same progress monitoring that regular education students receive. We will use the same assessments as the District. ESE students also will participate in the FCAT, which also will monitor the school's effectiveness in serving these students.

### **1.6.F. Population Projection of Students with Disabilities**

From the SJCSO disabled populations, we project that 14 percent of the student population may have disabilities. The SAPMS will serve students with mild to moderate disabling conditions who can be successful in an inclusionary environment.

### **1.6.G. Staff Plan for the Special Education Program**

Our goal is to have one ESE certified teacher to provide direct services or consult services.

### **1.6.H. Serving Gifted Students**

The goal of the Exceptional Child Education program at SAPMS will be to assist students with disabilities in meeting their educational objectives and needs as described in their Individual Education Plans (IEP) and to help them master the Montessori curriculum. The integrated curriculum approach of the Montessori method offer numerous opportunities for challenging gifted students and to promote progress at a pace that is child-directed on an individual level. Our goal also is to assist students with advanced placement (AP). If a gifted student is enrolled at SAPMS, our goal is to have a teacher with gifted endorsements will be on staff to provide gifted services or consultation.

## **1.7. English Language Learners**

### ***Evaluation Criteria:***

*Reviewers will look for:*

- *Demonstrated understanding of state and federal requirements regarding the education of English language learners.*
- *A commitment to serving the full range of needs of English language learners.*
- *Sound plans for educating English language learner students that reflect the full range of programs and services required to provide all students with a high quality education.*
- *Demonstrated capacity to meet the school's obligations under state and federal law regarding the education of English language learners.*

The SAPMS will work with any student help them learn to speak English in the course of the child's academic and social development. To do this, the SAPMS will include a Home Language Survey in the each student's application packet to identify students who require English for Speakers of Other Languages (ESOL) services. In addition, when preparing the personalized education plan for a student of limited proficiency in the English language, SAPMS faculty and the parent(s) of the student will plan the means for further instruction of the student in English and/or will specifically indicate how instruction will be modified in the basic subject areas. The SAPMS will either contract required ESOL services or will provide a certified ESOL teacher.

## I.8. School Climate and Discipline

### **Evaluation Criteria:**

*Reviewers will look for:*

- *A sound approach to classroom management and student discipline.*
- *Legally sound policies for student discipline, suspension, dismissal and recommendation for expulsion, including the school's code of conduct.*

### **I.8.A. Classroom Management and Student Discipline**

Discipline in the Montessori classroom is generally handled by means of positive peer pressure and the teaching of peaceful conflict resolution. Expectations for student behavior are set out in the beginning of the year and reinforced daily. The Montessori Courtesy Lessons form the basis for these expectations of respect of all others and their work. Nearly daily class meeting times are used to work out difficulties that might arise among students or to use examples of behavior as discussion points for improved interpersonal relations. Classroom teachers establish positive, redirective classroom disciplinary guidelines and procedures. When those are not effective, teachers use incremental and appropriate consequences. In the unanticipated event that more significant action is required, SAPMS will follow appropriate SJCSO guidelines.

Positive techniques that assist children in developing self-control and prosocial behavior will be practiced. Children will be given daily guidance until self-control is gained. Teachers will intervene when a child engages in disruptive, abusive, dangerous or destructive behavior. Factors contributing to a child's good behavior include the following:

- Teachers model the behavior expected of their children.
- Limits are clear and consistent.
- Consequences are logical and connected to the misbehavior.
- Positive behavior is encouraged.
- Ground rules and consequences are applied fairly.
- Conflict resolution skills are taught and practiced.

The SAPMS Board of Directors shall adopt appropriate policies in the areas of student discipline, student control, teacher removal of students from the classroom, student services plan, student records, as well as any others required by law.

Because SAPMS believes that parental involvement is a necessity within our program, our first step will be to ensure that parents are informed and involved in the monitoring of their child's behavior. In addition, the Montessori educational program includes within it discipline and behavior instructions, which will be adhered to and practiced on a daily basis. We also will have a parent contract and a Community Handbook that will address discipline issues.

### **I.8.B. Code of Conduct**

The Public Montessori School's Code of Conduct will be treated as an inseparable part of the school's character curriculum. It will be developed with input from teachers and parents through surveys. Each family will be provided a copy of the Code of Conduct and asked to sign a form as support. The Code of

Conduct shall govern every student attending the Montessori School and the teachers, Administrator, and Governing Board will enforce the consequences stated in the Code of Conduct.

The Director will have the authority to suspend a student from the SAPMS if the student's behavior violates the Code of Conduct and/or the parent or guardian fails to take responsibility for the conduct of the student or fails to cooperate with the Montessori School in efforts to correct the student's behavior.

The Principal may recommend expulsion to the Governing Board for a student who has repeated office referrals or for any single unlawful infraction. Parents and guardians of a student will be provided 5 days' written notice [mailed to the address provided by the parents or guardian] of the date upon which the Governing Board will vote upon a recommendation to expel the student and will be provided an opportunity to speak to the Governing Board prior to the Board's vote.

The Code of Student Conduct will include student discipline policies, Zero Tolerance Federal Gun Free School Zone Act, suspension criteria, procedures, appeal and due process as required by State and Federal laws. The Code of Student Conduct shall comply with requirements of the SJCSO, State, and Federal laws. The Charter will adhere to State and Federal laws in so far as each student will be afforded "Due Process," e.g., notice and an opportunity to be heard.

The School will be responsible for all matters relating to student discipline, and all appeals concerning decisions made by the School. The Board will not hear appeals from students or parent(s)/ guardian(s) of the School regarding disciplinary matters. The School shall follow State and Federal laws.

The School will implement and adhere to procedures for discipline of ESE students as outlined in administrative directives and comply with requirements for the Individuals with Disabilities Education Act.

The School shall not have the authority to expel students from the District, but may, in accordance with the School, parent contract and Code of Conduct and the terms of the charter suspend or expel a student from the School. The Board shall be notified in such event and the student shall be notified in such event and the student shall be subject to further discipline, or expulsion, as provided by Florida law and Board policies.

The School will maintain a safe learning environment at all times to ensure the health, safety, and welfare of all students attending.

The Board will follow the guidelines of the SJCSO regarding lockdown procedures, evacuation of the building, hostage situations, or gun/weapon possession. SAPMS reserves the right to create its own code of conduct in subsequent years if the governing board and school staff feel this is appropriate. An individualized code of conduct would be submitted to the sponsor before the implementation for review and feedback.

SAPMS will implement the following to ensure the safety and security of students and staff:

- The Board and staff are committed to a drug- and violence-free environment.
- In the area of food service, all requirements will be met for food safety when serving and transporting food.
- Fire inspections and health inspections of the School will be performed as required.



- Each family will complete forms such as the School health services-health history form, the Health Emergency Information Card parental consent form, the School registration disclosure form to identify any former expulsions, arrests or juvenile justice actions.
- Each person who wishes to become a volunteer will fill out an application and follow all necessary procedures to become approved.

SAPMS will ensure risk management by compliance with all fire marshal regulations and all building codes applicable to the school. Outside the facility, the grounds will be well maintained. Signs will be posted covering any and all traffic areas. Local enforcement officers will be contracted to help secure necessary Crossing Guards or other personnel if the campus has walkers in need of this service. Inside the facilities, all passageways and walkways will be kept easily accessible and free from clutter. Exit signs will be placed at appropriate locations and all fire or emergency exits will be kept easily accessible. In addition, all regulations will be complied with in relation to handicap accessibility. Each classroom will be equipped with a fully operational and approved fire extinguisher, an approved First Aid Kit and disposable plastic gloves.

Accurate attendance records will be maintained by the Classroom Teacher and the Office. Children will have qualified adult supervision at all times. Signs will be posted above the sinks with proper hand-washing procedures. Signs will be posted to inform staff of all applicable Occupational Safety and Health Administration (OSHA) procedures. The school will be a smoke-free zone. The building itself will be inspected for any inappropriate or defective building material, such as asbestos or decaying materials, and necessary improvements will be made.

The SAPMS will adhere to a zero tolerance policy for fighting and aggressive behavior. In the event that dismissal ever becomes necessary at SAPMS, the final decision will be made by the Director. Before such a decision would be considered, a number of interventions would be implemented to assist the student and his family in the appropriate measures to be taken. These would include, but not be limited to the following:

- Student-teacher conferences.
- Parent-teacher conferences to discover the root causes of misbehavior and seek the parents' involvement to correct the situation. Teachers also will assist in developing a plan of action to make changes toward the desired solution.
- Out-of-school suspension.
- Probationary status letter.

Reasons for dismissal would be as follows:

- **Attendance dismissal:** In the event that a student incurs more than 15 unexcused absences, a student may be dismissed. Dismissal for this reason will depend upon the reasons for absence and whether or not they can be categorized as excused. To be considered excused, proper documentation must be provided in a timely manner.
- **Behavior dismissal:** As outlined in the District Code of Conduct, immediate dismissal will take place for serious breaches of conduct such as possession of weapons, possession of drugs, and battery. A student may be dismissed for frequent or ongoing bouts of misbehavior. Should the strategies outlined to avoid dismissal not serve as a catalyst for change in behavior, the student may ultimately be dismissed.

- **Academic dismissal:** If a student is academically unsuccessful at SAPMS, intervention strategies such as parent teacher conferences, tutoring, academic improvement plans and academic probation will be implemented. Dismissal will happen only if all these strategies prove unsuccessful.
- **Dismissal due to lack of parental support:** SAPMS's goal is to assist all students attending SAPMS, with the parents' support, in attaining success. In cases in which a parent refuses to support the school as outlined in their contract, student dismissal may occur. Consistent failure to attend reviews, parent conferences or parent meetings, and/or to fulfill parental volunteer requirements may result in a student being removed from the school. Parent contracts will be signed at the beginning of each school year outlining parental requirements for the year.
- **Dismissal due to serious breaches of conduct:** Students who engage in severe breaches of conduct as defined by the District Code of Conduct will be assured due process by an appeals process via the director and governing board. All ESE will be disciplined according to state and federal ESE guidelines. All appropriate parent notifications and consideration for manifestation of disabilities will be addressed in disciplining ESE students.

## II. Organizational Plan

### II.9.Governance

**Evaluation Criteria:**

Reviewers will look for:

- *A governing board that is legally structured, or has a plan to organize in conformity with the laws of Florida.*
- *A clear description of the governing board's obligations and responsibilities.*
- *Evidence that the proposed governing board will contribute to the wide range of knowledge and skill needed to oversee a charter school.*
- *A clear, sensible delineation of roles and responsibilities in relation to governance and school management.*
- *A clear, sensible method for resolving disputes between a parent and the school.*

#### II.9.A. Legal Structure of the Governing Board

The Saint Augustine Montessori Community, Inc. (SAMC) was organized and incorporated with the State of Florida Department of State exclusively for charitable and educational purposes in the public interest within the meaning of § 501(c)(3) of the Internal Revenue Code. Chief among its purposes is the operation of the SAPMS as a Florida public charter school. Within the context of the Montessori educational philosophy, SAMC will strive for age, sex, ethnic, racial, and socioeconomic diversity, and will seek to nurture the potential of every child to become intrinsically motivated and to love learning now and for a lifetime.

A nine-member SAMC Board of Trustees will govern SAPMS with statutory responsibilities pursuant to Florida School Code Section 1002.33. The SAMC Board of Trustees (the Board) will be the guardian of its mission, charged, by definition, to establish the School, monitor its health and viability, advocate for the School and its students whenever possible, and assess with regularity the mission's relevance and vitality.

The SAMC Board of Trustees will govern all operations of SAPMS, delegating most day-to-day management to the administrative staff pursuant to its bylaws. One of the first steps following approval of the Charter School Application will be the selection and hiring of the Director/Principal of the School.

During the planning of the School, before operation, the Founders appointed an initial five-member board (the Founding Board) from parents and educators in the community. Up to three additional members will be appointed before the September 2011 Board Meeting. People with expertise in Montessori education, charter school operations, public education, business, and law support this board.

The Founding Board shall transition into the SAMC Board of Trustees by January 2012. SAMC Board of Trustees will be responsible for ensuring that the school is run in compliance with its Charter, all applicable state and federal laws, and that the school is financially viable.

Once all Board seats are filled and the School is open, the Board of Trustees will consist of nine members, including a minimum of two parents of current SAPMS students. The Board will elect the Trustees. The Board elects officers from within its own ranks. Board members will serve staggered 3-year terms, and members are eligible for re-election. A Trustee's term starts at the September meeting.

The Board will have officers including President, Vice President, Treasurer, and Secretary. The Board of Trustees has drafted governing policies and Bylaws, including policies that establish Committees of the Board. Initial Committees will likely include Finance & Development, Curriculum, Community Relations, Governance, and Facilities.

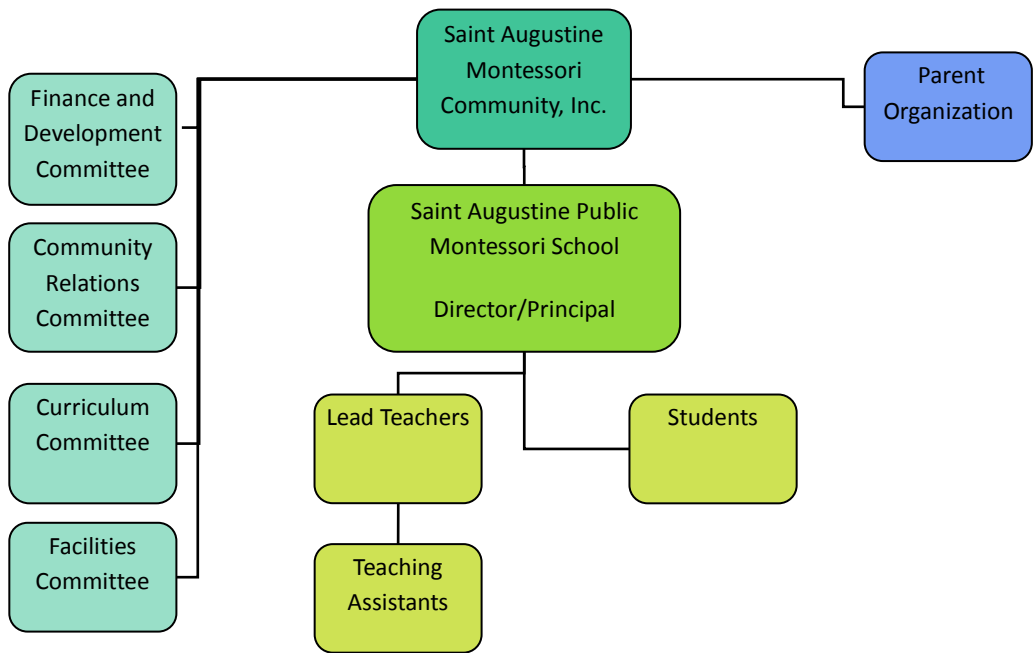
The school shall adopt a Conflict of Interests Code, which shall comply with school specific conflict of interest regulations adopted by the State Board of Education. Each member of the Board of Trustees shall complete a Conflicts of Interest Disclosure Form and update it annually.

The SAMC Board of Trustees may execute any powers delegated by law to it and consistent with its purpose, shall discharge any duty imposed by law upon it, and may delegate to an officer or employee of Saint Augustine Public Montessori School some duties pursuant to its bylaws. The Board, however, retains ultimate responsibility over the performance of those powers or duties so delegated. With the exception of substitute teachers, the Board may not delegate hiring or firing of employees nor the execution or termination of contracts.

The Board of Trustees has ultimate control and responsibility, in accordance with the bylaws, for all policy making, hiring decisions, performance evaluations, capital expense proposals, budgeting, and fundraising. It is also responsible for short- and long-range facility planning.

**II.9.B. Organization Chart**

The organizational chart below shows the proposed reporting structure to the governing board of the school (SAMC Board of Trustees) and the relationship of the Board to the SAPMS’s Director/Principal. The Director/Principal reports directly to the Board of Trustees, is selected, hired and evaluated by the Board and serves on the Board as an ex-officio non-voting member. All of the SAPMS Administration and Staff report to the SAPMS Director/Principal. The duties and responsibilities of the Director/Principal and the Board of Trustees are described in detail in the following section. The committees listed on the organizational chart are likely to be the starting committees, but these are Committees of the Board, report to the Board, and the set of committees may change from time to time as described in the Bylaws. The SAMC expects to create a separate organization made up of parents of students at SAPMS. This organization is likely to provide input to the SAMC Board.



### **II.9.C. Governing Board Roles and Responsibilities**

The SAMC volunteer Board of Trustees is responsible for the preservation of the vision and mission of the School. The Boards' primary responsibility is to maintain the integrity of the school's Montessori educational vision through time and to ensure that the school remains viable to serve future generations. Fiscal integrity, present and future is integral to the responsibility of preserving the vision. SAMC's Board will be composed of parents, educators and community members who will put aside personal issues to focus on its common mission. In the conduct of official business, the Board should act and speak only as a whole.

The Board will hire and oversee the Director/Principal and that person will be an ex-officio, non-voting member of the Board. SAPMS's Director/Principal will supervise and manage the daily operations of the school. During the planning year, the Board will establish roles reserved for the Director/Principal and those for the Board. The Director/Principal will be empowered to direct and implement many operational decisions (e.g., day-to-day issues that arise in matters relating to curriculum, personnel, and daily school business and organization), but will always be responsible to the Board, in ways clearly defined. Board members refer parent questions or concerns to the Director/Principal. As such, methods of communication and reporting will be established for a successful and productive relationship with the Director/Principal.

The roles reserved for the Board are expected to include, at a minimum, the following:

- Oversight of the mission and objectives.
- Review and maintenance of bylaws, and establishment of policies and plans consistent with the mission (e.g. code of ethics, personnel manual, etc.)
- Account for the financial well-being of the School, including capital assets, operating budgets, fund-raising, and endowments.
- Board evaluation annually and establishment of goals for the following year.
- Board development through ongoing education, new trustee orientation, and leadership succession planning.
- Hiring and evaluation of the Director/Principal and working with the Director/Principal to establish goals for the following year.
- Approval and oversight of annual budget and fund-raising programs.
- Receipt of funds for the operation of the school in accordance with the charter school laws.
- Solicitation and receipt of grants, donations consistent with the mission of the school.
- Oversight and final approval of the hiring, discipline, or dismissal of school employees as recommended by the Director/Principal.
- Appointment of Board advisory members.
- Delineation of educational priorities.
- Oversight for the School's growth plan.
- Approving the school's personnel policies and monitoring the implementation of these policies by the Director/Principal and/or duly constituted committees.

- Approval of contracts with outside entities or persons.
- Reviewing and approving significant contracts (e.g., for facilities and benefit programs).
- Financial audit oversight.
- All matters related to charter approval, amendment, or revocation.
- Composition of the Board that reflects a balance of expertise and perspectives needed to achieve the mission of the School.

The Board will meet monthly during the school year to discuss School operations, hear reports, and take action as per its governance functions. The Officers may be called upon to meet more frequently. Decisions will be made by a majority vote of Board members (a quorum) at each meeting. “Present” will apply not only to those physically present but also to those who hear and participate through alternative means (e.g., conference call, video, e-mail, etc.). The Board will obtain contracted services to assist in its work, as needed (e.g., consultants/experts in governance, curriculum development, setting of benchmarks, development, and Board training). A variety of contracted support services, in small amounts, will be necessary for the successful operation of the School and Board. Support personnel will provide office services as necessary (e.g., bookkeeping, business, purchasing, payroll, and secretarial services).

The individual Board Members’ roles and responsibilities are listed below.

### **All Members**

- Act in good faith, honestly, in the interests of the school
- Commit to establishing and maintaining trust in all relationships, especially within the school community.
- Ensure moral and ethical integrity in all aspects of the school’s affairs.
- Regularly seek representative feedback of parents, staff and children.
- Review and approve the budget. All Board members need to be involved as the budget sets plans and operations.
- Know our school’s vision, mission, principles, goals, policies and systems.
- Understand our school’s services, strengths, and needs.
- Strenuously avoid conflicts of interest; account for any benefit or gain.
- Serve in leadership positions and willingly and enthusiastically undertake assignments.
- Attend (as far as practical and reasonable) key internal functions and functions promoting SAPMS.
- Prepare for and participate in Board and Committee meetings.
- Challenge Board, Committee, and management decisions.
- Loyal support majority decisions of the Board after votes are taken and resolutions made.

- Maintain confidentiality of the Board's sessions and speak for the Board only when authorized to do so.
- Work on issues between Board meetings and be prepared for meetings so that meetings are efficient and effective and produce timely decisions.
- Develop future possible nominations for membership of the Board and Committees.
- Ensure the Board does not spend its time on non-Board issues and instead stays focused on Board issues.

## **Officers**

The officers of SAMC shall be President, Vice-President, Treasurer, and Secretary. The Board of Trustees may elect or appoint such other officers as it shall deem desirable, which officers shall have authority to perform the duties prescribed, from time to time, by the Board of Trustees. The duties and responsibilities of the Officers are also included in the Bylaws. Each person elected an officer shall continue in office for one year after his election or until his successor shall have been duly elected and qualified or until his earlier death, resignation or removal in accordance with the Bylaws. Every elected officer must be a Trustee.

## **President**

The President shall be the chief executive officer of the Corporation, responsible, along with his or her fellow Trustees, for the oversight of its business and affairs. He or she shall preside at all meetings of the Board and shall serve as chairperson of the Board of Trustees. The President shall have full and equal vote as accorded to all trustees. The President may enter into and execute in the name of the Corporation contracts or other instruments that are authorized by the Board of Trustees. The President may delegate, as needed, to any other officer any or all of the duties of the office of President. He or she shall have such other powers and duties as may be prescribed by the Board of Trustees or by these By-laws. Except as otherwise provided herein, the President shall be an ex-officio member without vote of all committees of the Corporation or any of its constituent bodies.

## **Vice President**

The Vice President shall have such duties and responsibilities as may be delegated to him or her by the President. The Vice President shall have full and equal vote as accorded to all trustees. In the absence of the President, the Vice President shall perform all the duties of the President and, when so acting, shall have all the responsibilities of and be subject to all the restrictions as fall upon the President, including presiding at meetings of the Board of Trustees. He or she shall have such other powers and duties as may be prescribed by the Board of Trustees or by these By-laws.

## **Treasurer**

The Treasurer shall be the chief financial officer of the Corporation and shall have oversight of the Accountant or Business Administrator that takes responsibility of the financial records, investments, and other evidences of school properties and assets. The Treasurer shall ensure that the Accountant/Business Administrator keeps regular books of account for the Corporation that set out business transactions of the Corporation and ensure that such books to be at all times open to inspection at their place of keeping to any Board of Trustee member. The Treasurer shall be a member of the Finance and Development Committee. The Treasurer shall have charge and custody of, and shall be responsible for, all funds and securities of the Corporation; shall cause to be received and cause the

receipts to be given for moneys due and payable to the Corporation from any source whatsoever, including local, state and federal funds, and privately donated funds. The treasurer also shall make payments out of the same in proper orders approved by the Board of Trustees, signed by the President or Vice President of the Board. The Treasurer may pay out such funds on orders that have been properly signed without prior approval of the Board for the payment of amounts owing under any contracts that have been previously approved by the board, and by which prompt payment the School will receive a discount or other advantage. The Treasurer shall cause an audit of the books and accounts to be conducted annually by independent auditors; shall cause the proper tax returns and annual reports to be timely filed with the proper authorities; and shall generally cause to be performed all the duties incident to the office of Treasurer, together with such other duties as from time to time may be assigned to him or her by the President or by the Board of Trustees.

In the absence of action by the Board of Trustees to the contrary, the Treasurer shall cause to be invested any funds not required for current operation in appropriate investments. In the event the Board of Trustees designates specific investments or rules with respect to same, the Treasurer shall abide by such designations. The Treasurer shall render to the Board of Trustees and the members of the school community, at the Annual Meeting, statements evidencing the current financial condition of the Corporation.

### **Secretary**

The Secretary of the Board of Trustees shall keep or cause to be kept the minutes of all meetings of the Board, including the time and place, the names of those present, the actions taken, and the votes on such actions. The Secretary shall present the minutes of the previous meeting at the subsequent meeting to be voted on by the Board and duly noted in the minutes of the instant meeting. The Secretary shall see that all notices are duly given in accordance with the provisions of these Bylaws or as required by law. He or she shall see that the corporate records and the seal of the Corporation are kept; shall see that the seal of the Corporation is affixed to all documents, the execution of which on behalf of the Corporation under its seal is duly authorized or required in accordance with the provisions of the law or of these Bylaws. He or she shall see that a register is kept of the post office address of each Trustee which shall be furnished to the Secretary by such Trustee; shall see that Schedule A to these Bylaws (the list of Committees) is kept current and is updated, posted, and circulated as appropriate; and shall generally perform or direct the performance of all duties incident to the office of Secretary and such other duties as from time to time may be assigned to the Secretary by the President or by the Board of Trustees.

### **II.9.D Governing Board Policies and Procedures**

The Bylaws of SAMC, Inc., a Florida nonprofit corporation, are attached in Appendix C. These Bylaws describe the policies and procedures by which the governing board will operate, including Board powers and duties, Board member selection, removal procedures, code of ethics, conflict of interest and frequency of meetings.

SAPMS will use a policymaking board, SAMC Board of Trustees, which shall be subject to the provisions of laws and regulation governing the inspection of Public Records. SAPMS will maintain both active and archival records for current and former students in accordance with federal and Florida statutes and regulations.

SAPMS will provide the parents in writing the names of the members of the governing board and a means in which they may be contacted and the process for placing an item on the agenda for the governing board meeting.



A schedule of the dates, times, and place of regular meetings will remain posted at SAPMS. When meetings not on the regular schedules are held, notice will be given, and will be posted at the School not less than 24 hours before the meeting is held. The notice, which shall be posted in a conspicuous manner, shall include the following language: "This meeting is open to all members of the public under Florida's Open Meetings Act."

#### **II.9.E. Founding Group Transition to Governing Board**

The SAMC is a registered, not-for-profit organization comprised of the founding members and established to create and sustain a charter school in St. Augustine, Florida. The current work of the founding group is to prepare the charter school application, serve as an ambassador-organization in promoting the School, and select the first Board of Trustees. Following the approval of the charter and appointment of the Board of Trustees, the purpose of SAMC will become one of support and development for students, teachers, and the overall success of the School's mission. Brief biographical information of SAMC Board members, the founding group, appears in Appendix D.

In November 2010, a group of parents and Montessori educators came together to discuss an increasing need for Montessori Elementary education in the Saint Augustine area. Parents of preschoolers through second-graders affirmed the positive benefits their children had experienced from the Montessori environment and were eager to work towards an elementary continuation of this model of education, which fosters self-paced learning in a prepared, mixed-level classroom. The parents' desire to create this model as a public school option both for their own children and for all interested families, especially those who do not have the means to consider a private Montessori education option.

The founders of SAMC, Inc. (see Appendix D for brief biographies) include individuals with experience in education, legal, business, non-profit administration, and community advocacy. Many of the Founding Board families have had an affiliation with Moultrie Montessori School, which is a private primary Montessori school that is now a licensed preschool and Kindergarten in Saint Augustine. These families have a common belief that all children deserve the opportunity to excel academically within a Montessori learning culture.

All those working on SAPMS are seeking a mutually beneficial relationship with the SJCS, one in which respect for our philosophical strengths and differences is balanced with tangible benefits for all involved. SAMC is incorporated as a non-profit educational and charitable corporation (Appendix E, Articles of Incorporation).

#### **II.9.F. Board Member Recruitment and Development**

The founding team of the SAMC is made up of a group of parents and educators who are committed to developing, implementing and continuing a long-term Montessori public school option in St. Johns County. Each member brings individual abilities and skills to aid in the development of our school.

The main concern in selecting Board of Trustee members is to ensure that the group consists of a well-rounded mix of educators, parents, and members with other expertise and works as a team to ensure that a Montessori education is available in our community. These expertise fields include such areas as education, business, law, real estate, former experience on a Board, economics, and the ability to communicate our vision well to the community.

Solicitation of additional potential Board members is in progress. The Founding Board seeks members who are committed supporters of providing an authentic Montessori education option for the children of Saint Johns County. Those interested who meet the qualifying criteria are asked to submit a letter of interest to the Founding Board for consideration. Trustee selection will be based on personal and

professional background as well as a commitment to the School's mission, support, and sustainability. Trustees will represent the diversity of stakeholders, contributors and the community.

Criteria for Board membership are as follows:

- Understanding of and a commitment to Montessori principles.
- Commitment to children and the school's mission and vision.
- Appropriate reasons for wanting to be a member of the Board.
- Ability and eagerness to deal with values, vision and long term perspective.
- Strong listening skills and a desire to understand others and their views.

Once appointed, new members will undergo a formal orientation program to fully understand their roles and responsibilities. Board roles, responsibilities, policies and procedures will be studied and discussed before and during the Annual Meeting each year, beginning with the first Annual Meeting, which will be scheduled for September 2011. In addition to Board self-training of new members, all governing board members will be required to attend the State of Florida Governance Training following approval of the Charter School Application.

### **II.9.G Proposed Board Members**

The following individuals are proposed Board members:

- Irene Arriola
- Jeannie Buskirk
- Jean McDowell
- Carrie Morgan
- Roman Pytel

Susan Brummer will be an advisor to the Board and participate on the Curriculum Committee.

Brief biographies for the proposed Board members are included in Appendix D.

### **II.9.H. Dispute Resolution Methods**

SAPMS policy will be to work towards conflict prevention as much as possible and encourage open and direct communication between individuals.

### **SAPMS Student Concerns**

Teacher-facilitated class meetings, which are a regular part of the Montessori curriculum, will first be used as a tool to prevent and address issues prior to principal involvement.

### **Parent Concerns**

Parents and guardians are reminded that classroom teachers are professional educators, carrying out the mission of SAPMS. If an issue arises that is not routine or cannot be handled in a brief conversation with a teacher, a parent is asked to set an appointment with the teacher to discuss the matter in person or over the telephone rather than discussing the matter during school hours or in front of students.

Parents having concerns about Montessori, curriculum and instruction, or the educational program are to bring those matters to the classroom teacher. If a resolution cannot be reached, the parties can then bring the issue to the full Governing Board.

Parents having concerns about personnel (teachers or other staff members) or about classroom management and discipline are to address issues and questions first to the staff member in question, and, if no resolution, then to the principal, then to the Grievance Committee.

The Board-designated Grievance Committee will serve as the primary method for resolving disputes between a parent and the school if no resolution can be reached with the staff member in question. The Grievance Committee will comprise both parents and teachers to make non-binding recommendations to the Board of Trustees concerning the disposition of complaints. The Grievance Committee will have four members who will serve one-year terms, with one member designated as chairperson by the other committee members. Committee members shall be appointed each year at the first Board of Trustees meeting following the annual meeting. Grievance Committee members may serve no more than two consecutive terms on the committee.

### **Staff Concerns**

In the event that a concern is not resolved between parties with open and direct communication, the concern will then go to the Director/Principal. In the event further efforts are needed to resolve a staff conflict, the Principal may choose to refer the issue to a closed session of the Governing Board, where consultation is available for parties to discuss and clarify issues.

## **II.10. Management**

### **Evaluation Criteria:**

*Reviewers will look for:*

- *A management structure that includes clear delineation of roles and responsibilities for administering the day-to-day activities of the school.*
- *A sound plan for the recruitment, selection and evaluation of the school leader.*
- *A viable and adequate staffing plan. A sound plan for recruiting and retaining qualified and capable staff.*

### **II.10.A. School Management Structure**

To ensure that students at SAPMS are supported in their academic endeavors and personal growth, we will seek highly qualified, nurturing educators who will treat them with dignity and respect. Our students will feel safe, encouraged, and thereby free to mature, develop, and reach their full potential. We will seek educators who will serve as leaders, guides and role models, and who will challenge our children to challenge themselves.

### **Director/Principal**

Our Director/Principal will be Montessori-trained and hold, at minimum, a 4-year liberal arts degree and have considerable experience in the Montessori setting. He or she must be able to merge and manage the requirements of a Florida charter school with the Montessori approach.

The Director/Principal is responsible for the administration of the school in all aspects of its day-to-day operations. He or she will work with the Board, the District, students, parents, and community members, and other governing bodies specified by local and state law.

The Director's major areas of responsibility include the following:

- Advising the Board and making written recommendations to the Board on programs, policies, budget, and other school matters.
- Attending Board meetings, committee meetings, and any other meetings relevant to directing SAPMS.
- Preparing for all Board meetings, after consultation with the Board's chairperson.
- Providing reports to the Board on progress, programs, and problems of school operations.
- Reporting the needs of the school to the Board and policies of the Board to school and community members.
- Informing and enlisting the support and understanding of the public.
- Reporting educational programs and their results to the community.
- Maintaining relationships beneficial to the school with local and state public leaders.
- Developing and implementing school policies.
- Determining staffing needs and making recommendations of staff as necessary.
- Providing input during hiring decisions and making recommendations to the Board regarding new hires.
- Assigning, transferring, promoting and disciplining of staff.
- Delegating and defining duties of staff.
- Supervising and evaluating the instructional program.
- Implementing policy and philosophical directions established by the Board.
- Developing and implementing short and long-range planning.
- Strategic planning for school.
- Acting as liaison between charter school and the District.

In the first 3 to 5 years of operations, the SAMC anticipates that the Director also will serve as a lead teacher. The responsibilities of a person serving as both Director/Lead Teacher will be a mix of these two lists of responsibilities. In this situation, many of the responsibilities typical of a Montessori school Director listed above will become the responsibility of volunteers, Board members or support staff. Which duties will remain with the Director/Lead Teacher will depend on the particular skill sets of the person ultimately hired for this position.

The required and ideal qualifications of employment for the Director's position are shown in the following table.

### Required and Ideal Qualifications, Director Position

Required	Ideal
Baccalaureate Degree	Master's degree or Ph.D.
Montessori Certification for the Elementary Level	Montessori Credentials at the Elementary Level from a Montessori Accreditation Committee for Teacher Education (MACTE) approved program AND Florida Teaching Credential
Current First Aid/CPR	Same
Appropriate administrative experience	Plus administrative experience in both the public and private education sectors
Effective communication skills	Plus fluency in another language in addition to English and/or multilingual
Effective management skills	Plus Montessori Administration Certificate

### Lead Teachers

The job of the Montessori teacher is to follow each child's progress, to create an environment where materials are available to the students and presented when they are ready to progress, and to encourage children to complete each phase of their work. Montessori teachers are charged with meeting the students' physical, mental, and emotional needs, with designing individual and group learning opportunities, and with extensively documenting students' progress and activities. Ultimately, Montessori teachers support their students in ways that lead the children toward their own successes.

As mentioned previously, the SAPMS Director also will serve as the lead teacher at startup. Our lead teachers will hold, at minimum, 4-year liberal arts degrees, and will have Montessori training. All SAPMS teachers must comply with the teaching requirements for Florida Charter Schools. They must understand and believe in the Montessori philosophy and materials and be familiar with individualized observation and record keeping. SAPMS teachers will be inquisitive, reflective, creative problem solvers who committed to the School's mission.

The teacher serves as a facilitator and guide in the Montessori classroom and is responsible for the functioning of the learning environment and all aspects of its day-to-day operations. He or she works with the Director, and as necessary, the Board of Directors, the District, students, parents, community members, and the other governing bodies specified by local and state law.

The school will not employ an individual to provide instructional services or to serve as a teacher aide if the individual's certificate or license as an educator is suspended or revoked by this or any other state. SAPMS will disclose to the parents of its students the qualifications of instructional personnel hired by the School.

The teacher's major areas of responsibility include the following:

- Preparing the Montessori classroom environment to meet the students' needs and interests.
- Understanding and promoting the school's vision, mission, and goals to students, parents, and community.

- Working with the community of administrators, teachers, parents, students, and board of directors, in articulating and maintaining the integrity and scope of the Montessori Method.
- Presenting consistent individual and group lessons to the students and supporting each child's direction and success.
- Meeting regularly with students to work with them in assessing their own success and facilitating an individual path of progress.
- Working with students of varying abilities assigned to the classroom, including identifying those that might need further screening for ESE, providing support to those with learning difficulties as diagnosed, as well as attending meetings to support children who require it.
- Maintaining student records, reports, evaluations, inventories, and tests.
- Participating in field trips and overnights.
- Attending Board meetings, committee meetings, and any other meetings relevant to teaching at SAPMS as necessary.
- Continuing professional development and participating in recommended conferences, training programs, courses, and other areas of professional growth.

The required and ideal qualifications of employment for the Teacher positions are shown in the following table.

#### **Required and Ideal Qualifications, Teacher Positions**

<b>Required</b>	<b>Ideal</b>
Baccalaureate Degree	Master's degree or Ph.D.
Montessori Certification or working towards this certification at the Elementary Level	Montessori Credentials at the Elementary Level from an MACTE-approved program
Florida State Teaching credential	Same
Montessori classroom experience	Teaching experience in a public Montessori School Elementary Classroom
Current First Aid/CPR	Same

#### **Teaching Assistants**

Our Teaching Assistants must demonstrate their ability to embrace the Montessori approach and will be expected to fully support the SAPMS mission. Teaching Assistants will be expected to complete Montessori training appropriate to their assisting duties.

#### **Specialty Teachers**

Specialty teachers must demonstrate subject knowledge and the ability to work well with children. SAPMS may employ or retain staff to provide instruction in any extra-core subject, including but not limited to physical education, the performing arts, foreign language, environmental education, and any other enrichment program which shall be understood to constitute an extra-core subject. Specialty Teachers are expected to complete training to provide them with an overview of Montessori philosophy

and basic methodology and to demonstrate a basic understanding of these principles. Specialty teachers and volunteers will be required to complete applications as necessary to comply with District requirements.

### **Other Staff, Substitutes, and Consultants**

All other staff must demonstrate the abilities necessary to carry out their responsibilities effectively.

### **II.10.B. Director Selection Criteria**

The Director/Principal will be selected and evaluated by the SAMC Board of Directors. A complete job description and advertisement will be prepared by the Board. The job advertisement will be published and distributed to AMI, AMS, and other Montessori teacher organizations via website postings, e-mail and inclusion on listservers beginning in September 2011 with continual updates until a sufficient applicant pool is received. The Board will screen and interview applicants with input from the Curriculum Committee. The Board will make the final selection of the Director/Principal. The goal is to select the Director/Principal by March 2012.

The administration of the Montessori programs is different than traditional schools. The Director of SAPMS must be trained in the Montessori Method, and specifically trained for the elementary grades. The Director will become an important advocate for the Montessori program as well as liaison with the District.

SAMC Board will be responsible for evaluating the performance of the school Director/Principal on an annual basis. The Director/Principal will be evaluated under the District performance appraisal, with modifications to reflect Montessori-specific teaching goals.

### **II.10.C. Staffing Plan**

The staffing plan for each year of the charter term and beyond is shown in the table below. This is one way that children might be grouped in classrooms but the actual grouping will depend on several factors, including the number of children with previous Montessori experience. These numbers correspond to the numbers in the projected enrollment section of the application (see **Section I.2.B. Enrollment Projections** on page 6). The student:teacher ratio in Grades 1-3 will be at or below 1:18, and the ratio in Grades 4-6 will be at or below 1:22. Numbers allowed in each grade level will be adjusted as children move in and out of the school. This table is discussed in further detail in **Section II.13.C Enrollment Policies and Procedures** on page 75.

### SAPMS Projected Staffing Plan, Years 1-6

	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6
	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018
<b>Students by Age</b>						
6 years old	18	20	22	24	26	26
7 years old	16	18	20	22	24	26
8 years old	14	16	18	20	22	24
9 years old	4	16	18	20	22	22
10 years old	0	6	16	18	20	24
11 years old	0	0	6	16	18	20
Students 6-9 years old	48	54	60	66	72	76
Students 9-12 years old	4	22	40	54	60	66
<b>Students Total</b>	<b>52</b>	<b>76</b>	<b>100</b>	<b>120</b>	<b>132</b>	<b>142</b>
Director/Principal				1	1	1
Director/Teacher	1	1	1			
Teachers 6 to 9	1	1	1	3	3	3
Teachers 9 to 12	0	1	2	2	2	3
<b>Teachers Total</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>5</b>	<b>6</b>
Assistants 6 to 9	2	2	2	3	3	3
Assistants 9 to 12	0	1	2	2	2	3
<b>Assistants Total</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>5</b>	<b>6</b>
<b>Classrooms Total</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>5</b>	<b>6</b>

**Note:** Montessori-educated 4<sup>th</sup> graders will be allowed to continue in the early elementary classes during the first year until enough students to form an upper elementary class are enrolled.

## II.10.D. Staff Recruitment, Selection, Development and Evaluation

### Staff Recruitment, Selection and Development

The SAMC Board will recruit qualified personnel to serve in administrative, instructional, instructional support, and non-instructional support capacities. Recruiting of these applicants will begin simultaneously with the search for Director/Principal. Optimally, the Director/Principal will be hired in time to provide significant input in selecting administrative and instructional personnel for the first year.



The Board will make ultimate hiring decisions based on recommendations from the Director/Principal. Offers of employment are extended contingent upon successful completion of a criminal background check and a background/reference check. In addition, staff will possess First Aid/CPR Certification and current TB testing.

SAPMS focuses on teacher leadership through professional development, team building, collaborative decision-making and addressing the strengths of the school community through multiple intelligences. SAPMS staff members are committed to the collaborative building of a new school program and to strive to exceed state standards through Montessori education.

Teachers will be recruited by advertising positions in local and regional newspapers and websites. Additionally, job announcements will be posted in Montessori teacher, AMS, and AMI organizations, college and university offices and newspapers, and through social media. After a review of resumes, the Board and Director/Principal will select candidates who meet the criteria for the positions for interview. After references and criminal background checks are satisfactorily reviewed, the most qualified applicants will be interviewed by the Director and the personnel committee of the Board, who will make recommendations to the full Board.

Teachers will be hired based upon their demonstrated skill and ability in teaching children in the Montessori Method and their academic credentials, which include compliance with the teaching requirements for Florida Charter Schools, Montessori certification or in-progress certification, and a demonstrated subject matter expertise and practical ability to instruct elementary school students in all subject disciplines. All employees must be approved by the SAMC Board.

Faculty, staff, and persons who perform services for the School will be employed by a contract between the Board and the individual, subject only to such terms and conditions as established by the Board, including but not limited to the terms of the School's Charter and SAPMS's personnel policy. In all instances the Board will comply with local, state, and federal employment regulations.

SAPMS's policy is to afford equal opportunity to all qualified faculty and staff and applicants for employment without regard to race, color, sex, religion, age or national origin, other than to the extent that sex or age is legally a necessary bona fide occupational qualification. SAPMS will have and maintain a policy that provides a process for investigation and resolution of complaints, and provides for appropriate discipline, including termination for improper discrimination or harassment. SAPMS employment practices will be nonsectarian and will not violate any provisions of federal or Florida Statutes.

### **Staff Evaluation**

The Director/Principal will be responsible for supervising and evaluating the SAPMS's teaching staff annually. Teachers and staff members are at-will employees with one-year contracts. Teachers will be annually evaluated by the administration on the basis of criteria that may include a teacher portfolio, classroom observation, academic achievement, and student/parent feedback. Teachers and staff receiving a positive evaluation will be notified in April if their contracts will be renewed the following year. Staff members of SAPMS will be evaluated by the Director/Principal of the school under the District performance appraisal, with modifications to reflect Montessori-specific teaching goals.

The employee evaluation process will be carried out to assess the effectiveness of an employee's school job performances. Information gathered about work performance will aid the Director and Board of the School in making personnel decisions related to such areas as training, compensation, promotion, job assignments, retention, and long-range planning for the School. Evaluation of employees is intended to

be participatory in nature, involving the employee's input as well as that of the Director, thereby helping all personnel contribute to the betterment of the School. The major factors that will be evaluated during the formal performance reviews are the quality and quantity of an employee's work habits, interpersonal relationships, attendance, and adaptability to job conditions. In addition to considering the above stated factors during their performance reviews, the employees also must be held accountable for student learning.

## II.11. Educational Service Providers

### **Evaluation Criteria:**

*Reviewers will look for:*

- *A persuasive explanation of the reasons for contracting with an education service provider.*
- *A persuasive explanation of how the proposed relationship with the ESP will further the school's mission.*
- *A clear description of the services to be provided by the ESP.*
- *A clear delineation of the roles and responsibilities between the school's governing board and the ESP.*
- *A clearly defined performance-based relationship between the school's board and ESP.*

The SAPMS does not intend to enter into a contract with an Education Service Provider (ESP). Therefore, this section is not applicable.

## II.12. Human Resources and Employment

### **Evaluation Criteria:**

*Reviewers will look for:*

- *A compensation plan that will attract and retain quality staff.*
- *Policies and procedures that hold staff to high professional standards or a plan to develop policies and procedures.*

### II.12.A. Compensation Plan

SAPMS is a public employer and will employ staff in compliance with all legal codes and standards. SAPMS is an Equal Opportunity Employer, and will not discriminate against any person due to gender, religious or political preferences, race, ethnicity, age, disability, nationality, or other personal preferences. Salaries and employee benefits are discussed below.

#### Salary

The Director/Principal and Lead Teachers will be paid a salary. The salaries of these full-time personnel shall be paid bi-weekly. Teaching Assistants and all non-teacher personnel, whether full-time or part-time, will be paid on an hourly rate as employees or as independent professionals based on negotiated rates. The starting year salaries listed in the proposed budget are as follows:

- \$47,500.00 Director/Principal
- \$35,000.00 Lead Teacher
- \$24,000.00 for Teaching Assistants (as an hourly rate)

These salaries provide a general starting point for the Director/Principal and Lead Teacher salaries. Actual salaries will depend upon qualifications and experience of the candidates. The SAPMS proposed budget calculates a 2 percent rate increase annually. Because funding is anticipated to become more secure after Year 3, SAPMS hopes to provide larger salary increases at that time.

Employees are at will. No agreements are valid without the approval of the Board. The Board determines individual salaries and wages. The SAPMS policy is that all employees are employed at the will of the school for an indefinite period. Accordingly, either SAPMS or the employee can terminate this relationship at any time, for any reason, without cause, and with or without notice. Because of the importance of retaining teachers in the multi-age Montessori classroom, the Board may adopt salary rate policies that provide greater increases at 3 year intervals to encourage longevity.

### **Vacation**

The SAPMS will publish an annual calendar of holidays and vacations during which the School will officially be closed. Full-time teachers will also receive a maximum of two (2) days of paid personal leave per year. Personal leave days must be used during the school year in which they are accrued.

### **Sick Leave**

Full-time salaried teachers will receive five (5) sick days per school year. Sick leave is cumulative from year to year up to a maximum of twenty days. Part-time teachers will receive two (2) sick days per year. For purposes of sick leave for part-time teachers, one day will equal the number of hours in that employee's regularly scheduled work day.

### **Retirement**

Employees at SAPMS will participate in the Federal Social Security System as required by law. SAPMS will ensure that all employees are informed of other retirement options available to them and coordinate their participation. All certified staff including teachers, substitutes, and the Director (if meeting eligibility requirements) may participate in the state retirement fund. The Director shall be responsible for enrolling and ensuring arrangements are made for coverage and participation in the State retirement system and Social Security.

### **Health Insurance and Other Benefits**

Initially, SAPMS will not offer group health benefits to any employee. SAPMS will offer full-time, salaried employees an annual stipend of \$3,600 that they may (at their option) use to purchase health insurance. Each year the Board will review the feasibility of offering a group benefit plan to employees.

### **General Provisions**

SAPMS will comply with all federal, state, and local laws and rules related to pre-employment screening, hiring, employment compensation and leave. SAPMS reserves the right to amend the above personnel provisions as necessary to comply with applicable laws and rules, and as otherwise necessary.

### **II.12.B. Personnel Policies and Procedures**

Professional development will be a core element at SAPMS, aiding in high teacher retention and the creation and maintenance of a positive atmosphere. This will also enable ongoing support, assessment and improvement of the mission and goals. It will substantively provide a means of evaluation and improvement in the work of those charged with teaching our children and ensuring the success of our School.

Each staff member at SAPMS will have an individual professional development plan. This plan will guide the staff member to participate in meaningful professional development opportunities that further the school's abilities to provide an authentic Montessori education. These individual plans will be evaluated yearly and reviewed on a continuous and as-needed basis.

Each year, all SAPMS teachers will participate in high quality professional development that will increase their ability to effectively carry out unique Montessori teaching approaches while improving academic achievement. Professional development will address the most recent findings regarding teaching styles, effective teaching practices and the means to continue these approaches. Success will be measured by review of course outlines and attendance logs of the staff development trainings. The Director/Principal must approve all seminars, workshops, and conferences.

As the school faculty grows, more opportunity will be afforded for onsite Montessori training. During the summers following Years 4 and 5, a four-week program will be held whereby a group of SAPMS students will be recruited to attend special Montessori summer classes offered at a Montessori facility. Students will receive instruction from SAPMS teachers who are being trained by trainers while under their supervision. This approach to the preparation of new Montessori teachers and the strengthening of teachers' ability to address different student learning styles is an important element in the sustainability of the Montessori program.

SAPMS will stay informed of any continuing education opportunities or instructional services made available to other elementary schools in the District and may elect to participate in those opportunities or services.

All staff members are expected to follow the District's guidelines for conduct. If for any reason staff conduct is in question, the employee in question will meet with the Director in response to his/her behavior. Teachers are expected will conduct themselves in a manner that is highly professional and of high moral character.

## II.13. Student Recruitment and Enrollment

### **Evaluation Criteria:**

*Reviewers will look for:*

- *A student recruitment plan that will enable the school to attract its targeted population.*
- *An enrollment and admissions process that is open, fair, and in accordance with applicable law.*

### II.13.A. Student Recruitment of Targeted Populations

The SAPMS will employ many forms of outreach to recruit and inform potential students and their families of the opportunity the School will provide. Because SAPMS stands to be the first public Montessori school in Saint Johns County, we will need to help parents and guardians and our potential students in their understanding of the School. Work in this area will begin as soon as the charter has been granted. Through literature and organizing gatherings at homes, libraries, places of faith, and other venues, we will introduce the Montessori Method and the SAPMS approach, mission, and goals.

Working with community leaders, we will develop outreach materials and approaches appropriate for various audiences. Once the School is in operation, we will offer tours and observation opportunities as well. We also will create an informative website and participate in social media outlets to help students and their families assess the School and make an informed decision before submitting their application materials.

The Board will most likely have a Recruitment Committee and will partner with several service organizations working in and around Saint Augustine and beyond to build our student body. SAPMS will establish relationships with members of SJCS as well as other districts, and with potential feeder schools, including but not limited to private Montessori pre-K and Kindergarten programs in the area.

SAPMS is being founded by parents and community members who are interested in a startup charter school based on the philosophy of Dr. Maria Montessori. Community input during the planning year may result in refinement of policies and procedures. Community members and educators may offer fresh perspectives on the organization and operation. Staff members, parents, and community members will assist in the review and refinement of the information in this application as it becomes the policies and procedures for operating the school.

Highlights of the marketing and recruitment plan envisioned for the school are listed below.

- The School will use existing Montessori literature and organize gatherings at homes, libraries, places of faith, and other venues to introduce the Montessori Method and the SAPMS approach, mission and goals.
- SAPMS will work with community leaders and volunteers to develop outreach materials and approaches appropriate for various audiences.
- The School will offer tours and observation opportunities once in operation.
- SAPMS will create an informative website to help students and their families assess the School and make an informed decision before submitting their application materials.
- SAPMS will use social media tools to provide information about the school and allow discussion among online community groups.
- The Board will establish relationships with members of SJCS as well as other districts, and with potential feeder schools including but not limited to private Montessori pre-K and Kindergarten programs in the area.
- SAPMS will provide public information through open houses, direct mailings, and media.
- SAPMS will respond to all legal requests for information about the School, its programs, or status.
- The School will provide public records upon request. Such releases of public records shall not violate the confidentiality of student records protected by the Family Educational Right to Privacy Act (FERPA), and will conform to the requirements of Florida Statutes.

The SAMC already knows about area parents' substantial interest in having their child attend SAPMS. We have conducted e-mail surveys and have a Facebook page (<http://www.facebook.com/SAPMS>) where interest can be quantified. Additionally, the public Montessori schools in Jacksonville maintains a waiting list with over 100 interested students. We have support and interest from the private Montessori school in St. Augustine as well as those in surrounding counties that currently serve St. Johns County residents. These are anticipated to be the feeder schools for SAPMS.

Letters of Support from community members and parents in St. Johns County are included in Appendix F.

### **II.13.B Recruitment for Diversity**

SAPMS wants and expects a diverse student body. SAPMS recognizes its legal and social responsibility to take all feasible steps to enroll a student population that is reflective of the ethnic and racial diversity in the District. Such diversity is of utmost importance to the Founding Board. SAPMS will continue to seek out and build relationships with community organizations and resources to further our goal of diversity in abilities, ethnic backgrounds, and socio-economic levels. SAPMS will implement a student recruitment strategy that reflects its goal of a diverse student population.

SAPMS is non-sectarian in its programs, admission policies, employment practices, and all other operations. The school will not charge tuition and does not discriminate on the basis of race, ethnicity, national origin, gender, or disability.

While SAPMS cannot legally ensure a specific racial and ethnic balance, the following outreach plans to achieve a racial, ethnic and socioeconomic balance will be implemented:

- Establishing an enrollment process that is scheduled and adopted to include a timeline that allows for a broad-based recruiting and application process.
- Locating events in diverse neighborhoods such as open house nights, Montessori informational seminars, and prospective parent nights for parents and other activities during the school year where the community is invited in to learn about SAPMS.
- Advertising outreach activities on the website, in the Saint Augustine Record, and through community newsletters.
- Including plans for after-school care once the school is in operation.
- Prioritizing diversity when selecting the location for the school building.
- Working with community leaders who have expertise working with diversity and populations that might be more difficult to reach through other means.

SAPMS believes that these activities will attract a broad base of applicants, but if it does not, SAPMS will review these outreach measures to consider any improvements necessary for the following year of operation.

### **II.13.C Enrollment Policies and Procedures**

The goals of SAPMS's admissions policy are 1) to attract, enroll, and retain at our school the broadest spectrum of students and families representative of the rich diversity existing in the District and 2) to provide for classroom growth consistent with providing an authentic Montessori education.

The enrollment table in **Section II.10.C, Staffing Plan** (see page 68) projects student enrollment, summary of classes by program level and staffing needs. The figures in the table are based on the student enrollment history of similar Montessori charter schools, as well as based on the ages of the children with known interest in attending the school. Since these numbers are projections, actual total and grade-level enrollment numbers possibly will be slightly higher or lower than those shown here. Generally speaking, almost all new students to the school will arrive at the first-grade level because Montessori education begins with the primary classroom serving children aged 3 to 6. With an existing Montessori preschool/Kindergarten in the area, we see ourselves as offering an extension of Montessori education that started at the primary level with a ready reservoir of incoming students, creating continuity for the greater population of students.

Many public schools implementing Montessori programs struggle with admission criteria. Experience has shown it can be challenging for children to transition into a Montessori-style teaching method as they grow older and become more accustomed to the more traditional educational approach. Montessori classes work very differently depending on the percentage of children with Montessori experience. Some children without Montessori preschool experience adapt easily to expectations in the Montessori elementary class and some do not. When children who cannot work independently are in the minority, the teacher can focus attention, use older children as tutors, and so on. When this group makes up the

majority of the class, Montessori practices involving free choice for major portions of the day are hard to implement, at least early in the school year.

SAPMS will limit the number of students who do not have previous Montessori experience as a means to maintaining the Montessori philosophy in the classroom. The School will attempt to keep a ratio of four children with Montessori experience for every one child without Montessori experience in each classroom. Montessori teachers have observed that having a higher percentage of new students without previous Montessori experience in a class can make the class more difficult to normalize according to Dr. Montessori's definition of the term.

In the Montessori classroom it does **not** carry the dictionary definition, "To make normal, especially to cause to conform to a standard or norm." Rather, the term *normalized* refers to special characteristics that Maria Montessori observed when children were allowed to work freely in a prepared environment. The North American Montessori Teacher's Association describes it as follows:

Dr. Montessori observed that when children are allowed freedom in an environment suited to their needs, they blossom. After a period of intense concentration, and working with materials that fully engage their interest, children appear to be refreshed and contented. Through continued concentrated work of their own choice, children grow in inner discipline and peace. She called this process *normalization* and cited it as "the most important single result of our whole work."

*Normalization* is a Montessori term that describes the process that takes place in Montessori classrooms around the world, in which young children, who typically have a short attention span, learn to focus their intelligence, concentrate their energies for long periods of time, and take tremendous satisfaction from their work.

In his book, *Maria Montessori: Her Life and Work*, E.M. Standing described the following characteristics of normalization in the child between the ages of 3 and 6:

- A love of order.
- A love of work.
- Profound spontaneous concentration.
- Attachment to reality.
- Love of silence and of working alone.
- Sublimation of the possessive instinct.
- Obedience.
- Independence and initiative.
- Spontaneous self-discipline.
- Joy.
- The power to act from real choice and not just from idle curiosity.

As they grow, Montessori children, given a free and beneficial environment, learn to approach challenges with gusto and find true joy in acquiring knowledge. A spirit of vivacious activity pervades the Montessori classroom as the students undertake the ongoing work of self-revelation.

It is not the work of the teacher but the other students and class as a whole result in a child being normalized. Without a large percentage of already normalized children setting the culture of the class, it is very difficult to achieve. This is why prioritizing previous Montessori experience is critical in the target population and enrollment practices of a new elementary-level Montessori school.

SAPMS will have to grow responsibly, making certain to provide sufficient resources to students, their families, and the School's faculty and staff. With no public Montessori schools in the County, only a small percentage of Saint Johns County families have the resources necessary to send their children to private Montessori programs. We see the SAPMS as an option for all families interested in a Montessori education, and are committed to bringing Montessori public.

We have planned our growth with respect to the following considerations:

- The need to grow at a reasonable and responsible rate to best serve and support our students, their families and our faculty.
- The need to integrate students with and without Montessori experience during the first few years of the School's existence.
- The need to establish multi-aged classrooms with the goal of 26 students with one Lead Teacher and one Assistant Teacher per classroom.

As with all charter schools, any student can apply for available spaces within the SAPMS, and if the number of applicants exceeds our capacity, our classrooms will be populated by children chosen via a lottery system, organized by grade. Like any charter, we can expect that our student body will be a mix of many kinds of learners, from many different backgrounds. In our early years we expect to have some students with Montessori experience, and some without.

The Montessori pedagogy is significantly different from that of a traditional classroom, in part because it builds on students' Montessori-specific experience year after year. Therefore, the method of ramping up a Montessori school is slightly more complicated than a ramp-up program for a more traditional approach. Montessori experts agree that it can be challenging for most children beyond second or third grade to enter into the tradition if they have not had previous exposure.

Though we will be open to applications across all grades in the early years of operation, once the School fills to capacity, admission will be determined by available space, and therefore, for most students, the entry point will be first grade. However, the Director/Principal will have some discretion in choosing to extend the opportunity for older students to apply on the basis of available space. In these circumstances, the Director/Principal would evaluate each potential student's educational experience to determine the appropriate fit with the Montessori pedagogy. Should the number of potential students exceed the available spots, a blind lottery will be conducted to determine which of the older student(s) would be invited to enroll. Please also see **Admission Procedures** on page 78.

To aid in the transition that some of our students with no previous Montessori experience may encounter during the School's first few years, our lower elementary students will have full access to the key Montessori-specific materials used by pre-k and kindergarten students. Additionally, students' personal learning plans will ensure that they are helped into the Montessori approach in whatever ways are determined to be necessary.

When a family without Montessori experience considers SAPMS, they should consider that a child with the following qualities would be the most likely to succeed in the learning environment of the Montessori program:



- Passion for learning.
- Self-motivation.
- Willingness to investigate and take risks.
- Enjoyment in choosing among several options.
- A self-directed learner.
- Ability to work independently.
- Ability to follow through and complete tasks.
- Respect for self, the environment, and others.
- An awareness of personal responsibility.
- Ability to work with others.
- Honesty.
- Respect for personal and academic endeavors.

### **Admission Procedures**

SAPMS is committed to building a diverse community of learners and their families who embrace the Montessori approach to education and recognize the unique journey that this opportunity provides. Admission to SAPMS will be open to any student who resides in St. Johns County. Methods of admission shall not be designed, intended or used to discriminate or violate individual rights in any manner. SAPMS will follow the basic method of admissions:

- Admission shall be blind.
- Should the number of applicants exceed capacity, students will be chosen by a lottery system, with a wait list developed from the lottery overflow.

The admissions process will include the following:

1. Parents shall attend a pre-admission prospective parent meeting at which the Montessori approach and school expectations of students and parents/guardians will be explained.
2. Parents shall attend a school observation (waived the first year).
3. Application to the school shall be completed and returned to the school no later than the deadline published for that school year. Application packets with information about the School, its philosophy and expectations of attending students and their families will be shared, along with student-related policies. Parents will be asked to sign an agreement indicating their understanding of the School's mission and expectations as part of the admission process.
4. Interested families will then submit their application.
5. A committee will review the applications to be sure all information is complete.
6. Class size and configuration for the upcoming school year will be determined along with the capacity for students at each level.

7. Should applicants exceed the number of allotted slots, a formal lottery, organized by grade, will be held. Those not accepted in the lottery will be placed on a waiting list in the order determined by the lottery.
8. All accepted students will receive notification. Those who have been wait-listed will be notified.
9. Soon after the admission process is complete, SAPMS will hold meetings for admitted students and their families.

The SAMC Board reserves the right to further develop and amend the specific admissions process during the planning year.

The wait list will allow students the option of enrollment in case of an opening during the school year. The wait list is maintained only through one week prior to the open enrollment date of the following school year. Once on the wait list, a family will remain in that position until they are offered a spot in the school or express no further interest, until one week prior to open enrollment. A new application must be submitted each year. During enrollment, volunteers and paid employees will return calls and answer questions from prospective families. If families from the wait list are offered a position, they must accept that position within three business days or will lose that spot. If they decline the offer of enrollment, they may choose to be removed from the wait list or placed at the bottom of the wait list for that given year.

Students transferring into SAPMS will be placed in the SAPMS classroom that correlates with the grade level achieved at the former school. Upon transferring out of SAPMS, all student records will be sent to the student's next school following a request to transfer from the parents. The records will indicate which grade level the student attained.

To ensure that all students will be placed appropriately and benefit fully from the Montessori Method of education, the following pre-admission procedures are enforced. SAPMS reserves the right to deny admission if failure to comply with any of these procedures occurs. An admitted student may be removed from the school if failure to comply with these procedures is discovered after admission is granted.

## **Enrollment Provisions**

SAPMS will offer automatic re-enrollment to its students, provided they are in good standing. Families will have to provide a letter of intent by a stated date preceding the lottery, so there is clarity about available spaces.

If there are more applicants than capacity, enrollment, except for existing students of the School, for the open positions is determined by public random drawings that use the following preferences:

- Children who are siblings of a student enrolled in the school.
- Children of a member of the governing board of the school.
- Children of a school employee.
- Children with continuous Montessori experience.
- Children with Montessori experience.
- All other children who complete the enrollment process on time.

Families of eligible children must be willing to make an extraordinary commitment to their child's education. The Montessori school program is based on a cooperative type of learning that will involve a family and community spirit. Therefore, commitment to the School's mission and educational philosophy will manifest itself in the signing of the SAPMS Partnership Agreement, which will include a requirement of at least 20 hours of participation per year from each family in our school and an agreement that they will follow our policies, as outlined in the Community Handbook.

#### **II.13.D Parent Contracts**

The students of SAPMS will achieve the greatest success when our teachers and families work together. We see parents and guardians as key participants in the building of the school community and the success of the program. The regular presence of our students' parents and guardians will be part of the SAPMS culture, not an exception.

Parental guardian involvement will begin even before admission. As part of the enrollment process, parents and guardians will be asked to sign an agreement indicating their understanding of the mission and expectations of the students and their families. We will ask that parents and guardians participate in school activities as schedules allow. We will request that they be ambassadors for the SAPMS and that they agree to volunteer a minimum of 20 hours (20 hours for individual parents and 40 hours for couples) of labor over the course of the school year. This requirement may be reduced or increased as needed to fulfill the mission of the school, but the requirement will always be mandatory for all parents and guardians. In the event a parent or guardian faces a period of hardship during which volunteer hours would place an undue burden on the family, the parent or guardian can request exemption from the volunteer requirements for an agreed upon period of time.

Parent activities can and will take many shapes and forms and may include attending school events, participating in community service, chaperoning going out trips, assisting teachers, assisting in the office, and coordination of PTO-sponsored events.

The SAPMS will work to accommodate the different needs and situations of families and will value and celebrate the variety of ways our families will be able to contribute to the education of their children and the school overall. We will have parent participation on our board and we anticipate the establishment of a parent organization to create an opportunity for support, discussions, problem solving, and parent education.

Parents and guardians of children at SAPMS will receive regular reports on their children's academic and emotional growth. The Montessori model offers much in the way of communication and constant evaluation. By design, it helps parents/guardians become involved and engaged in their children's life at school and their overall education. The Montessori approach empowers both parents and their children to become advocates for their education, while encouraging respectful and thoughtful dialogue. We will expect that parents and guardians will work with us to ensure that communication is two-way, by offering a variety of means for that communication to take place (e.g., written feedback, surveys, and meetings).

Student work records will be sent home on a regular basis for parent/guardian review. Periodically, teachers will assess student progress via Montessori benchmarks. Progress reports will be sent and conferences held. Parent-teacher conferences may include student input in the forms of self-evaluations/participation. Parents or guardians will be required to meet or speak with teachers at least twice each 10-week period through conferences, e-mail and by phone. These communications and the commitment of the school to involve parents and guardians in the educational experience through volunteerism will help to engage families.

Parents will also serve in leadership positions as members of the Board, committees of the Board as well as on other ad hoc committees, such as charter renewal, facilities, and fundraising. Parents will be informed of Board activities by monthly meeting minutes that are distributed in communication folders. Each Board meeting agenda will include time for staff, parent, or student comments.

SAPMS will annually survey its parents, students, faculty and staff and present their findings in an Annual Report, which also includes information about governance, progress towards reaching goals, faculty and student turnover, program highlights and accomplishments, and all state-mandated assessment scores and state-mandated accountability indicators. The Annual Report will be distributed to local and state board of education members as required and made available at the school to faculty, staff, parents, and the community.

SAPMS will identify community organizations and businesses who are interested in participating in and/or supporting educational activities at the school and through Going Out activities. This will be an ongoing effort for the Director/Principal, Teachers, Students and the Board.

SAPMS is committed to the education of everyone in our community — our students, our teachers and our parents/guardians. We will seek to bring a variety of educational opportunities to the School and aim to shape the School as a place where people from within and beyond the school community come together to engage, experience, and grow. Professional and family education will deepen the understanding of the Montessori approach, highlight issues faced by our students (e.g., the role of technology, issues of respect of others and self), and facilitate ways families can enhance the work done at school. It will help them engage in their children's educational journey, from our youngest students to our most mature. Ultimately, we will capitalize on our diverse experiences and strengths to build a clear mission and a strong school community. SAPMS will be a community that will lead by example.

### **II.13.E Parental and Community Involvement**

Since learning occurs as a lifelong natural event, the home environment continues to be a learning lab for the Montessori child. The lessons parents offer daily in responsibility through allowances, trips, dialogue, and reading are all extensions of the classroom. The parent is expected to become involved in their child's lifelong development. Regular contact with the teacher is vital. Homework assignments are not emphasized, so families often have more time for meaningful family interaction. The family atmosphere also leads many parents to a willingness to share their time and talents to enhance the school environment and opportunities for children.

Parents will also serve in leadership positions as members of the Board, committees of the Board as well as on other ad-hoc committees, such as charter renewal, facilities, and fundraising. Parents will be informed of Board activities by monthly meeting minutes that are distributed in communication folders. Each Board meeting Agenda will include time for staff, parent, or student comments.

SAPMS will survey its parents, students, faculty and staff annually and present their findings in an Annual Report, which also includes information about governance, progress towards reaching goals, faculty and student turnover, program highlights and accomplishments, and all state-mandated assessment scores and state-mandated accountability indicators. The Annual Report will be distributed to local and state board of education members as required and made available at the school to faculty, staff, parents, and the community.

SAPMS will identify community organizations and businesses who are interested in participating in and/or supporting educational activities at the school and through Going Out activities. This will be an ongoing effort for the Director/Principal, Teachers, Students and the Board.

## III. Business Plan

### III.14. Facilities

**Evaluation Criteria:**

Reviewers will look for:

- A realistic plan for securing a facility that is appropriate and adequate for the school's program and targeted population.
- Evidence that the school has the necessary resources to fund the facilities

SAPMS intends to locate a site after approval of the Charter Application. SAPMS is seeking a balance in choosing its physical location between the goals of a central location and a natural setting. The preferred location will be within the limits of the City of St. Augustine. The Board will ensure that the facility meets all applicable zoning, fire and safety codes.

#### III.14.F. Facility Needs

SAPMS will require, at minimum, two classrooms in Year 1, three classrooms in Year 2, and four classrooms in Years 3, and five classrooms in Years 5 and 6. Ideally, each classroom would be 2000 square feet or larger, but 1000 square feet will suffice. The preference for a large space is because each classroom should function as a self-contained, homelike environment including a kitchen, library, science lab, art studio, and bathroom.

Each classroom should have access to ample natural light from operable windows and doors so that the children feel invited into the outdoor portion of the classroom. The outdoor classroom may be shared among all classes and should provide sufficient space for each class to have a dedicated area for outdoor learning projects.

SAPMS will require one office area of approximately 1000 square feet. The office area will provide a workspace for the director as well as copiers and equipment shared between all classrooms.

#### III.14.G. Facility Cost Estimates

SAPMS estimates a facility cost of between \$25 and \$35 per square foot per year. We arrived at this figure after consultation with a local real estate agent and review of several currently available facility locations (see Appendix G). SAPMS plans to lease a facility of at least 3000 square feet but will consider leasing a larger facility to accommodate the first 5 years of space requirements.

#### III.14.H. Facility Schedule

The Board is currently looking at potential site locations and will begin viewing and considering facilities in greater detail beginning in August 2011. Upon approval of this Charter Application, the Board can look in earnest and begin actual negotiations for renting a particular property. The Board will seek to secure the facility no later than May 2012 to make needed repairs and prepare the environment for the children in August 2012. Lease agreements will be made by the Board.

#### III.14.I. Back-up Facilities Plan

The Board will ensure that an adequate facility will be available for school to start in August 2012 by developing a contingency plan in the first quarter of 2012. This contingency plan will include a list of facilities available at that time and estimates of the cost and duration of the repairs required to be school

ready. With this information in hand, the Board will be prepared to make changes in the facility before opening in August 2012.

### III.14.J. Class Size Compliance

SAPMS's compliance with the class size requirements is covered in **Section I.2.A. Anticipated Student Population (F.S. §1002.33)** on page 5. The student teacher ratio at SAPMS will be at or below 1:18. The desired classroom size in an authentic Montessori classroom is from 25-35 students with one experienced Montessori teacher and one Montessori teacher aide, and at SAPMS this classroom size will be our eventual goal. It will also be critical that we grow the classes at a rate that allows for a majority of the students to have previous Montessori education and allows minimal disruption to children remaining in the same classroom for the 3-year cycle.

### III.15. Transportation Services

#### **Evaluation Criteria:**

*Reviewers will look for:*

- *A transportation plan that serves all eligible students and specifies in sufficient detail the responsibilities of all parties (the sponsor, the charter school, and other applicable service providers).*

Transportation to SAPMS will be provided by parents at their own expense. Enrollment will be limited to students within a reasonable distance or those that can provide their own transportation. We will seek a site that is centrally located and near socio-economically diverse areas so that a larger number of the targeted student population may be able to walk or bicycle to the school. The feasibility of providing transportation services will be reevaluated annually.

### III.16. Food Service

#### **Evaluation Criteria:**

*Reviewers will look for:*

- *A food service plan that will serve all students.*

SAPMS will contract with a food service provider for school lunches. Lunches will be delivered to the school immediately before lunch time. SAPMS will release a Request for Proposal after approval of the charter application and select a food service provider from the respondents.

SAPMS plans to participate in the National School Lunch Program. Each family will be provided with the proper form to determine eligibility for free or reduced cost lunches.

Students may choose to purchase lunch or bring their own lunch.

### III.17. Budget

#### **Evaluation Criteria:**

*Reviewers will look for:*

- *Budgetary projections which are consistent with all parts of the application, including the school's mission, educational program, staffing plan and facility.*
- *A realistic assessment of projected sources of revenue and expenses that ensure the financial viability of the school*

### **III.17.A. Operating Budget and III.17.B. Startup Budget**

The SAPMS operating and startup budgets are presented beginning on page 85.

### **III.17.C. Budget Narrative**

SAPMS will require approximately \$100,000 to cover the startup costs of the school from the approval of the charter by the School Board to the opening of the school.

SAPMS will apply for the Charter School Program Planning, Program Design, and Implementation Grant (Grant). Though the Grant would provide sufficient funds to cover the startup costs, the SAPMS Budget does not rely on the Grant funds, both because of the uncertainty of receiving the grant and the timing of grant funds availability. Because the Grant cannot be relied upon to pay startup costs, SAPMS will seek donations of \$100,000 or more through fundraising activities to cover the startup costs of the school. The startup costs will be used to hire and pay the director (1 month before the start of school); acquire, pay rent, and outfit the facility and classrooms (3 months before the start of school); hire the teachers and assistants (1/2 month before the start of school); and pay for requisite facilities and operating expenses.

SAPMS estimates enrollment of 52 students the first year, growing to 132 students in Year 5. SAPMS believes these estimates are realistic and conservative based on the early response from the community to the idea of a public Montessori elementary school, the success of Moultrie Montessori School (a private Montessori preschool in St. Augustine), and the success of other public and private Montessori schools in the surrounding area. The revenues listed in the budget are based on the projected FTE funding. Scenarios are presented based on the receipt of the Grant. The budget does not include any other potential funding source (such as other government grants or private grants) though they will be sought.

### **III.17.D. Spending Priorities**

The School will seek not to compromise on quality of materials, furniture, facility, or staff. SAPMS will prioritize an authentic Montessori environment above all except financial soundness. In the event that compromises are required in early years (as may be indicated in the Budget), SAPMS will use excess funds in subsequent years to secure additional or higher-quality materials, furniture, and facilities.

### **III.17.E. Monthly Cash Flow Projections**

The monthly cash flow projection for the SAPMS is shown on page 89.

### **III.17.F. Fundraising Plan**

Public schools, including SAPMS, cannot and will not ask families to pay for their children's education. Unfortunately, however, as evidenced by Florida charter schools currently in operation, funding from the State is often insufficient to maintain the charter schools' programming.

## SAPMS Projected Operating Budget

		Year 1	Year 2	Year 3	Year 4	Year 5
	Start Up	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017
<b>Students</b>						
	6	18	20	22	24	26
	7	16	18	20	22	24
	8	14	16	18	20	22
	9	4	16	18	20	22
	10	0	6	16	18	20
	11	0	0	6	16	18
	Students 6-9	48	54	60	66	72
	Students 9-12	4	22	40	54	60
	<b>Students Total</b>	<b>52</b>	<b>76</b>	<b>100</b>	<b>120</b>	<b>132</b>
<b>Director/Teacher</b>						
	<b>1</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>1</b>
	Director Teaches 6 to 9	Yes	Yes	Yes	No	No
<b>Teachers</b>						
	6 to 9	1	1	1	3	3
	9 to 12	0	1	2	2	2
	<b>Teachers Total</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>5</b>	<b>5</b>
<b>Assistants</b>						
	6 to 9	2	2	2	3	3



		Start Up	Year 1 2012-2013	Year 2 2013-2014	Year 3 2014-2015	Year 4 2015-2016	Year 5 2016-2017
9 to 12			0	1	2	2	2
<b>Assistants Total</b>			<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>5</b>
<b>Classrooms</b>							
<b>Classrooms Total</b>			<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>5</b>
<b>Revenue</b>							
FTE Revenue	\$	-	\$ 313,102.00	\$ 442,174.00	\$ 572,240.00	\$ 680,231.00	\$ 748,095.00
Food Service	\$	-	\$ 7,800.00	\$ 11,400.00	\$ 15,000.00	\$ 18,000.00	\$ 19,800.00
Startup Grant	\$	-	\$ 150,000.00	\$ 75,000.00	\$ -	\$ -	\$ -
Fundraising and Grants	\$	100,000.00	\$ 50,000.00	\$ 20,000.00	\$ 20,000.00	\$ 20,000.00	\$ 20,000.00
Revenue Subtotal (Grant)	\$	100,000.00	\$ 520,902.00	\$ 548,574.00	\$ 607,240.00	\$ 718,231.00	\$ 787,895.00
Revenue Subtotal (No Grant)	\$	100,000.00	\$ 370,902.00	\$ 473,574.00	\$ 607,240.00	\$ 718,231.00	\$ 787,895.00
<b>Expenses</b>							
Personnel							
Director/Teacher	\$	4,583.33	\$ 55,000.00	\$ 56,100.00	\$ 57,222.00	\$ 58,366.44	\$ 59,533.77
Teachers	\$	1,666.67	\$ 40,000.00	\$ 81,600.00	\$ 128,520.00	\$ 218,484.00	\$ 222,853.68
Assistants	\$	-	\$ 48,000.00	\$ 73,440.00	\$ 102,816.00	\$ 131,090.40	\$ 133,712.21
Employee Benefits	\$	673.13	\$ 26,201.10	\$ 40,739.78	\$ 56,277.70	\$ 83,535.23	\$ 84,413.93
<b>Personnel Subtotal</b>	\$	<b>6,923.13</b>	<b>\$ 169,201.10</b>	<b>\$ 251,879.78</b>	<b>\$ 344,835.70</b>	<b>\$ 491,476.07</b>	<b>\$ 500,513.59</b>

		Year 1	Year 2	Year 3	Year 4	Year 5
Start Up		2012-2013	2013-2014	2014-2015	2015-2016	2016-2017
<b>School Operations</b>						
Internal Accounting (CPA)	Waived	\$ 21,000.00	\$ 21,000.00	\$ 21,000.00	\$ 21,000.00	\$ 21,000.00
External Accounting (Audit)	N/A	\$ 7,000.00	\$ 7,000.00	\$ 7,000.00	\$ 7,000.00	\$ 7,000.00
Payroll Services	\$ 200.00	\$ 2,400.00	\$ 2,400.00	\$ 2,400.00	\$ 2,400.00	\$ 2,400.00
Advertising, Marketing, Community Relations	\$ 750.00	\$ 1,000.00	\$ 1,000.00	\$ -	\$ -	\$ -
Books		\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00
Class & Office Supplies		\$ 1,000.00	\$ 3,000.00			
Equipment & Furniture	\$ 26,000.00	\$ 15,500.00	\$ 16,750.00	\$ 18,000.00	\$ 6,250.00	\$ 19,250.00
Food Service		\$ 7,800.00	\$ 11,400.00	\$ 15,000.00	\$ 18,000.00	\$ 19,800.00
Transportation						
Dues & Fees		\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00
Teacher Professional Development		\$ 4,000.00		\$ 8,000.00		\$ 10,000.00
Board Training		\$ 1,000.00	\$ 1,000.00		\$ 1,000.00	
<b>School Operations Subtotal</b>	<b>\$ 26,950.00</b>	<b>\$ 62,700.00</b>	<b>\$ 65,550.00</b>	<b>\$ 73,400.00</b>	<b>\$ 57,650.00</b>	<b>\$ 81,450.00</b>
<b>Facilities Operations</b>						
Rent	\$ 30,000.00	\$ 90,000.00	\$ 120,000.00	\$ 150,000.00	\$ 180,000.00	\$ 180,000.00
Utilities (Phone, Electricity, Water & Sewer, Internet)	\$ 2,250.00	\$ 9,000.00	\$ 9,000.00	\$ 9,000.00	\$ 9,000.00	\$ 9,000.00
Repairs & Maintenance		\$ 5,000.00	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00
Insurance	\$ 2,626.35	\$ 10,505.40	\$ 10,505.40	\$ 10,505.40	\$ 10,505.40	\$ 10,505.40
<b>Facilities Operations Subtotal</b>	<b>\$ 34,876.35</b>	<b>\$ 114,505.40</b>	<b>\$ 144,505.40</b>	<b>\$ 174,505.40</b>	<b>\$ 204,505.40</b>	<b>\$ 204,505.40</b>

		Year 1	Year 2	Year 3	Year 4	Year 5
	Start Up	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017
Expense Subtotal (Grant)	\$ 68,749.48	\$ 346,406.50	\$ 461,935.18	\$ 592,741.10	\$ 753,631.47	\$ 786,468.99
Expense Subtotal (No Grant)	\$ 68,749.48	\$ 346,406.50	\$ 461,935.18	\$ 592,741.10	\$ 753,631.47	\$ 786,468.99

Totals

Reserve (Grant)	\$ 31,250.53	\$ 205,746.03	\$ 292,384.85	\$ 306,883.75	\$ 271,483.28	\$ 272,909.29
Reserve (No Grant)	\$ 31,250.53	\$ 55,746.03	\$ 67,384.85	\$ 81,883.75	\$ 46,483.28	\$ 47,909.29

### SAPMS Monthly Startup Cash Flow Projections

Month/Year	Revenues	Expenses	Reserve	Description
August 2011	\$ 5,000.00		\$ 5,000.00	Fundraising
September 2011	\$ 5,000.00		\$ 10,000.00	Fundraising
October 2011	\$ 7,500.00		\$ 17,500.00	Fundraising
November 2011	\$ 12,500.00		\$ 30,000.00	Fundraising
December 2011	\$ 7,500.00		\$ 37,500.00	Fundraising
January 2012	\$ 7,500.00		\$ 45,000.00	Fundraising
February 2012	\$ 7,500.00		\$ 52,500.00	Fundraising
February 2012		\$ 750.00	\$ 51,750.00	Advertising
March 2012	\$ 7,500.00		\$ 59,250.00	Fundraising
April 2012	\$ 10,000.00		\$ 69,250.00	Fundraising
May 2012	\$ 10,000.00		\$ 79,250.00	Fundraising
May 2012		\$ 10,000.00	\$ 69,250.00	Rent
May 2012		\$ 26,000.00	\$ 43,250.00	Equipment & Furniture
May 2012		\$ 875.45	\$ 42,374.55	Insurance
May 2012		\$ 750.00	\$ 41,624.55	Utilities
June 2012	\$ 10,000.00		\$ 51,624.55	Fundraising
June 2012		\$ 10,000.00	\$ 41,624.55	Rent
June 2012		\$ 875.45	\$ 40,749.10	Insurance
June 2012		\$ 750.00	\$ 39,999.10	Utilities
July 2012	\$ 10,000.00		\$ 49,999.10	Fundraising
July 2012		\$ 10,000.00	\$ 39,999.10	Rent
July 2012		\$ 875.45	\$ 39,123.65	Insurance
July 2012		\$ 750.00	\$ 38,373.65	Utilities
August 2012		\$ 6,923.13	\$ 31,450.53	Payroll (July 2012)
August 2012		\$ 200.00	\$ 31,250.53	Payroll Services (July 2012)
<b>Startup Budget End</b>			\$ 31,250.53	
FY 2012-2013	\$ 370,902.00	\$ 346,406.50	\$ 55,746.03	Based on 52 FTE and \$50,000 fundraising
FY 2013-2014	\$ 473,574.00	\$ 461,935.18	\$ 67,384.85	Based on 76 FTE and \$20,000 fundraising
FY 2014-2015	\$ 607,240.00	\$ 592,741.10	\$ 81,883.75	Based on 100 FTE and \$20,000 fundraising
FY 2015-2016	\$ 718,231.00	\$ 753,631.47	\$ 46,483.28	Based on 120 FTE and \$20,000 fundraising
FY 2016-2017	\$ 787,895.00	\$ 786,468.99	\$ 47,909.29	Based on 132 FTE and \$20,000 fundraising

From the start of this project, we have understood the significant need for building a sustainable development plan that will include fundraising, large and small, and the importance of crafting an effort that will garner support from families, community members, and businesses. We will seek support from local, state and national foundations to assist with both startup and recurrent capital and operating costs. These approaches have been met with measured success by existing charters, and our work in this area, which has already begun, will intensify upon approval of the charter application. To maximize our ability to build a strong and lasting project, even after the School is established, SAMC will also function as the non-profit organization responsible for development and economic sustainability of the SAPMS.

The SAPMS Fundraising Committee includes people who have an interest in the school, who have fundraising experience, and who are well connected in the St. Augustine community. The committee will generate a list of approximately 150 potential donors using personal connections. Included on the prospect list will be 30 people with “deep pockets.” Individuals in the committee will present the vision in one-on-one meetings with individuals on the prospect list to ask for donations. The goals for this would be to ask ten people for \$5,000 each, and twenty people for \$2,500 each, with a goal of \$100,000.

Second, SAPMS will host two separate fundraising events. The first will be a banquet-style event held in the fall in which we ask Board members and interested families to host a table of eight (including themselves) by inviting people with whom they have friendships. The program will include a keynote speaker with Montessori expertise, a personal testimony from a parent, video support, and child performance. The event will end with a closer asking for donations and stressing monthly giving as an option. The goal for this event is to have 75 people in attendance and to raise \$25,000, net expenses.

The second fundraiser will be a participant-event like a golf or surfing tournament in which participants pay a fee. The committee will ask for corporate sponsors who receive advertising benefits. The goal for this event netting expenses is \$25,000.

Using these methods of fundraising, we should reach or exceed our required fundraising levels of \$100,000 the first year, \$50,000 the second year, and \$20,000 annually thereafter.

### III.18. Financial Management and Oversight

#### **Evaluation Criteria:**

*Reviewers will look for:*

- *A clear description of how the school's finances will be managed. The description must include assurances that the governing board retains ultimate control over the school's finances.*
- *A clear description of strong internal controls. The system of internal controls must be sufficient to safeguard finances.*

#### **III.18.A. Proper Management of Financial Resources**

The Director and the Board will be responsible for ensuring that SAPMS uses accounting procedures required for Florida public schools. SAPMS has contacted several accounting firms with significant experience in Florida Charter School accounting. SAPMS will contract with one of these firms after application approval and expects the firm to waive charges prior to the first FTE payment from the District. SAPMS will contract with a payroll service chosen on the basis of recommendations of the contracted accountant. SAPMS will contract with a separate accounting firm for annual external auditing. The Board will review the budget regularly.

### **III.18.B. Controls to Safeguard Finances**

As mentioned above, SAPMS will follow Florida public school accounting guidelines and will put in place internal accounting controls necessary to safeguard its assets. The School will maintain accurate financial records in accordance with generally accepted accounting principles for non-profit corporations. An annual financial report will be provided with audit by an independent certified public accountant.

The Board will appoint a Treasurer to provide the oversight necessary for monitoring the financial status of the School. The Treasurer will report the financial status of the School to the Board at least monthly. The Board will also adopt policies for the financial management of the School, including policies on conflicts of interest for Board members and faculty. Accounting activities will consist primarily of the biweekly payroll paid to school personnel and the maintenance of an accounts payable system to track amounts due to vendors.

A general account will be set up for the administration of funds, and the Treasurer and named members of the Board will have check-writing authority. Each individual with check-writing authority will be covered by a fidelity bond in accordance with state guidelines.

SAPMS will comply with all requirements specified in the law pertaining to reporting requirements. This law requires an annual report, annual financial audit and report, program audit, and participation during the annual school budget process. The School will also comply with all requirements regarding the contents of its annual report.

The Board will select an independent auditor annually to complete the required annual audit and report. The audit will address accounting practices and review the School's internal controls. The audit will be conducted in accordance with applicable generally accepted accounting principles. The annual audit is anticipated for completion within 6 months of the close of the fiscal year. The Board will review and respond to the audit report, if necessary, and include the audit results in its annual report.

### **III.18.C. Accounting Records**

SAPMS will hire an accounting firm that specializes in Florida charter school accounting after the charter application is approved. The Director and the Board will be responsible for overseeing the work of the accounting firm. Records will be kept by the hired firm and maintained by the School and the SAMC Board of Trustees. The Board will elect a Treasurer to provide the oversight necessary for monitoring the financial status of the School and the Treasurer will report the financial status of the School to the Board at least monthly.

### **III.18.D. Storage of Student and Financial Records**

SAPMS will acquire fireproof filing cabinets that will be located in an office with a locking door for storage of student and financial records. SAPMS' contract with an external accounting firm will include storage of a copy of financial records in digital format.

### **III.18.E. Insurance Requirements**

Upon approval of the charter application, the Board will bind a General Liability policy that will remain in effect until more comprehensive insurance policies are required. At the time the Director is hired, the Board will bind a Workers Compensation policy, and the coverage will be increased as additional employees are hired. At the time the facility is leased or materials and supplies are acquired (whichever comes first), the SAPMS will bind property insurance and directors and officers liability policies. Insurance agents have been contacted, and the budget estimates are based on their estimates.

### III.19. Action Plan

**Evaluation Criteria:**

Reviewers will look for an action plan that:

- Provides a thoughtful and realistic implementation plan that covers major operational items and provides flexibility for addressing unanticipated events.

In addition to the following table, please also see the SAPMS budget projections in **Section III.17. Budget**, which begins on page 83.

**Timeline for School Startup and Program Activities**

Major Activity	Time Frame	Committee/Office
Form Montessori Planning Team	November 2010	Founding team
Research Montessori Charter Possibilities	September 2010 – December 2010	Founding team
Study Local Appeal Of Montessori Theme	December 2010 – April 2011	Founding team, Community Relations Committee
Conduct Project Needs Assessment	January 2011	Founding team
Operate School Planning Committees	January 2011 – August 2012	
Develop Draft Charter Application	December 2010 – June 2011	Curriculum Committee with input from interested parties
Develop Draft Bylaws for Nonprofit	January 2011	Founding Team
Apply for Non-Profit Incorporation	February 2011	Founding Team
Finalize Charter Application	May 2011 – July 2011	Curriculum Committee
Apply for Charter with School Board	June 2011 – July 28, 2011	Interim Board of Trustees
School Board Decision	September - October 2011	SJC School Board, Interim Board of Trustees
Determine Facilities Plans	September 2011 – December 2011	Facilities Committee, BOT
Select Charter School Site	December 2011 – March 2012	BOT
Seek Federal/State Charter Grant	August 2011 – January 2012	Finance and Development Committee, BOT
Select Director/Principal	February 2012	BOT
Synchronize Montessori Curriculum with State Requirements	October 2011 – June 2012	Curriculum Committee, BOT
Develop Community Relations and Marketing Plan	June 2011 - October 2011	Community Relations Committee
Establish Community Partnerships	October 2011 - (ongoing)	Community Relations Committee
Host Public Input Forum	November 2011 and March 2012	Community Relations Committee, BOT

<b>Major Activity</b>	<b>Time Frame</b>	<b>Committee/Office</b>
Launch Media Campaign Publicizing New Charter	November 2011	Community Relations Committee, BOT
Recruit Students	September 2011 – March 2012 (continued through school opening)	Community Relations Committee, BOT
Purchase Supplies/Equipment	April - May 2011 - (ongoing)	Curriculum Committee, Facilities Committee, BOT, Director, Faculty
Identify School Personnel	February - July 2012	Curriculum Committee, BOT
School District staff, permitting offices to inspect the school prior to opening	June 2012	Facilities Committee, County Inspections, City Inspections, Montessori Certification specialist
Conduct Montessori Training Conduct Curriculum and Staff Development Training	June – August 2012 Ongoing	Curriculum Committee, BOT, Director/Principal
Refine Curriculum & Staff Development Plans	August 2012	BOT, Director/Principal, Faculty, Montessori experts
Open St. Augustine Public Montessori School	August 2012	BOT, Director/Principal, Faculty, Students
Form Parent Organization	November 2012	Parent Liaisons, Director/Principal, BOT
Begin Monthly Charter School Board Meetings	September 2011 (ongoing)	BOT
Monitor School Programs and Collect Formative Evaluation Data	January 2013	Faculty, Director/Principal Montessori expert
Analyze and Reflect On Montessori Curriculum	February 2013	Faculty, Director/Principal Montessori expert BOT
Analyze Evaluation and Performance-Based Test Data	May - August 2013 May - August 2014 May - August 2015 May - August 2016	Faculty, Director/Principal BOT
Submit Annual Performance Reports	2012 2013 2014 2015	Director/Principal, Evaluator BOD



## APPENDIX

### **A. Montessori Planes of Development and The Five Great Lessons**

#### **Mapping the Planes of Development**

In the Montessori Method, the Planes of Development divide children's growth into four six-year cycles, ranging from birth to 24 years of age. For the purposes of this application, though, the founding team would like to demarcate the four relevant 3-year stages that reflect traditional Montessori student organization between birth and 12 years of age:

- 0-3 Years Old: The Infant Program - not supported by SAPMS
- 3-6 Years Old: The Primary Program - not supported by SAPMS
- 6-9 Years Old: Early Elementary Program
- 9-12 Years Old: Upper Elementary Program

In each plane, the three organizing concepts that describe the intersection of the child's development and education are as follows:

- There is a specific development goal.
- A clearly defined direction is in place to drive attainment of the goal.
- Specific sensitivities in each plane facilitate obtaining the goal.

This notion of sensitivities is critical to a Montessori education. Sensitivities may be thought of as times when a child is primed to achieve particular goals. Sensitive periods may last days, months, or years, depending upon the child.

#### **The First Plane of Development: Birth to Age 6**

Characterized by significant physical and psychological growth, exploration and development, this plane is a time of unconscious development, or the time of the "Absorbent Mind." According to Montessori, more learning takes place at this time in life than during any other. Language, cognitive, and motor skills begin to develop and children imitate and begin to create expectations of the world around them. Emotionally, children in the First Plane have a strong need for love, acceptance and security, in addition to as much freedom as they can safely handle.

#### **The Second Plane of Development: Age 6 to Age 12**

The Second Plane typifies that which most people associate as the heart of childhood, and it will be served at school by the lower (ages 6-9) and upper (ages 9-12) elementary programs. The absorbent mind is behind the child now and the conscious mind takes its place. Learning occurs more slowly though more steadily. Repetition is less appealing without increased task variation.

At this level of development, children are increasingly social, culminating in a preference to work with others rather than individually, marking the beginning of this level of development. They have an insatiable appetite for knowledge and a great capacity for concentration. They are interested in learning everything and put forth an intense effort in doing so. Montessori recognized children's interest in the social networks of their immediate environment and in the larger world. Thus, community and cultural awareness are at the core of this plane's sensitive periods and are reflected in the Montessori curriculum via study in history, geography, language arts, and the sciences.

Additionally, Montessori identified the Second Plane as a sensitive period for imagination and thus, at this time the curriculum introduces the Integrated Comprehensive Curriculum, which includes the Five Great Lessons and other Key Lessons. Montessori's Integrated Comprehensive Curriculum leverages children's developing creativity and links it to all disciplines in a manner that holistically connects the children to each other and through their learning, to all other things. The curriculum also leverages children's budding sense of right and wrong to develop their growing ability to reason.

## Montessori Elementary Program Overview

The child of the Second Plane needs an environment prepared with the characteristics of that plane firmly in mind. Although the classroom is not big enough to hold all the experiences and challenges that the child needs, it is nevertheless important as a safe, orderly place from which the child can launch into the wider world. Above all, the elementary classroom must be a place where the child can explore the world in the company of his or her peers. It must give the child all the freedoms that are necessary for such a collaborative venture: freedom of movement, freedom to work together, freedom to communicate, freedom to choose work, and freedom to work at one's own pace.

The curriculum itself must provide the keys of knowledge to unlock the various disciplines that the child wishes to explore. It must respect the Second Plane child's need for exercise of the imagination and the child's fascination with stories. It must provide opportunities for child-initiated projects that stretch the child's abilities to the limit and the support necessary to accomplish them. The environment must model the best practices in community building, in non-violent conflict resolution, and in adaptation to a diverse world in which many cultures and value systems must live or die together.

Given the right environment and the loving support of observant adults, the child who completes the full cycle of holistic education provided in a Montessori elementary school should have gained a clear understanding of the basic structure of the universe and of human knowledge. The child should be prepared to leave childhood behind and to enter adolescence as a highly independent, highly competent individual, balanced in physical, intellectual and social achievements. In adolescence the graduate of the elementary will be prepared to go safely out into the world; to pursue self-education in many areas; to make responsible decisions and act on them in a responsible way; to recognize limits and give, ask for, and receive help, as needed. When the work of the Second Plane is done, the child will be ready to find a place in society and, ultimately, a vocation that will be his or her unique contribution to the building of a peaceful world.

As was the case with the Planes of Development, Montessori arrived at the concept of *integrated comprehensive curriculum* as a result of her extensive global research. Integrated comprehensive curriculum provides children with a global vision. It presents a picture of the unity of the universe, which helps children to organize their intellect, to understand their place in the world, and to develop an appreciation and gratitude for the universe. The Five Great Lessons and the Key Lessons provide the path through the integrated comprehensive curriculum.

The Five Great Lessons, as well as the Key Lessons, convey the interrelationship of all facets of the universe and its inhabitants. Since children in the Second Plane of Development have a burgeoning interest in the world around them and are just beginning to recognize their own imaginative and creative abilities, Montessori opted to introduce these concepts with stories. The stories ignite children's sense of wonder, prompt exploration across all curricular areas, and place great emphasis on the interconnectedness of all life and learning. The stories presented by the Great Lessons are intentionally geared toward children's interests and natural states of development and serve as a central organizing

framework for student learning. More specifically, the Five Great Lessons are designed to have the following effects:

- Ignite intellectual curiosity.
- Spark the imagination of students.
- Initiate students' explorations of important questions.
- Stimulate students' desire to discover and learn.
- Give students an awareness of the natural world and its laws.
- Inspire students to explore history, geography, mathematics, the sciences and language arts.
- Lead students to contemplate the future.
- Instill in students reverence and gratitude for the people and accomplishments of the past.

A breakdown of the name of each Great Lesson and its corresponding high-level associated curriculum that is strengthened through the Key Lessons follows.

<b>The First Great Lesson: The Beginning of the Universe and Earth</b>	<b>The Second Great Lesson: Life Comes to Earth</b>	<b>The Third Great Lesson: Humans Come to Earth</b>	<b>The Fourth Great Lesson: How Writing Began</b>	<b>The Fifth Great Lesson: Story of Numbers/ History of Mathematics</b>
<ul style="list-style-type: none"> <li>• The Universe</li> <li>• The Solar System</li> <li>• Composition of the Earth</li> <li>• Volcanoes</li> <li>• Rocks</li> <li>• Chemistry: The Three States of Matter</li> <li>• Creation Stories</li> </ul>	<ul style="list-style-type: none"> <li>• Bacteria</li> <li>• Plants (Classification and parts of ferns, conifers, and flowering plants)</li> <li>• Fossils</li> <li>• Trilobites</li> <li>• Dinosaurs</li> <li>• Living and Nonliving</li> <li>• Classification Work</li> <li>• Kingdom Animalia (Classification and parts of insects, fish, amphibians, reptiles, birds, mammals)</li> <li>• Oceans and Ocean Life</li> <li>• Supercontinents (Pangaea, Laurasia, Gondwanaland)</li> <li>• Continents</li> <li>• Mountains</li> <li>• Oxygen &amp; Carbon Dioxide</li> </ul>	<ul style="list-style-type: none"> <li>• Ancient Civilizations</li> <li>• Fundamental Needs</li> </ul> <p>The History of:</p> <ul style="list-style-type: none"> <li>• Tools</li> <li>• Food preparation and Storage</li> <li>• Clothing</li> <li>• Shelter</li> <li>• Transportation</li> <li>• Medicine</li> <li>• Defense</li> <li>• Art</li> <li>• Religion/Spirituality</li> <li>• Culture</li> </ul>	<ul style="list-style-type: none"> <li>• History of Writing</li> <li>• Hieroglyphic and Cuneiform Writing</li> <li>• Different Alphabets</li> <li>• Different Writing Systems (letters and characters)</li> <li>• Ancient Civilizations</li> <li>• The Printing Press</li> </ul>	<ul style="list-style-type: none"> <li>• Numbering systems</li> <li>• Mathematical operations</li> <li>• Fractions, Decimals</li> <li>• Multiples, Squares and Cubes</li> <li>• Percentages and Ratio</li> <li>• Probability</li> <li>• Intro to Algebra</li> <li>• Origins and Types of Numbers</li> <li>• Scientific Notation</li> <li>• Mathematicians</li> <li>• Geometry</li> <li>• Theorems</li> <li>• Measurement</li> <li>• Estimation</li> <li>• Graphs</li> <li>• Patterning,</li> <li>• Money Concepts</li> </ul>

## APPENDIX

### **B. Sample Montessori Elementary Checklist for Early and Upper Elementary**

A comprehensive list of materials and concepts appears on the next several pages.

APPENDIX

**C. Bylaws**

The SAMC Bylaws are reproduced below.

**BYLAWS**  
**OF**  
**SAINT AUGUSTINE MONTESSORI COMMUNITY, INC.**  
**(A Florida non-profit corporation)**

ARTICLE I.

NAME, OFFICES, AND SEAL OF CORPORATION

Section 1.01. Name of Corporation.

The name of the Corporation shall be as specified in its Articles of Incorporation, as amended, to wit: (hereinafter sometimes referred to as the "Corporation").

Section 1.02. Corporate Name.

The Corporation may conduct business under the name SAINT AUGUSTINE MONTESSORI COMMUNITY, INC.

Section 1.03. Offices of Corporation.

The Corporation shall have and continuously maintain in this State a registered office and a registered agent whose office is identical with such registered office, and may have other offices within or without the State of Florida as the Board of Trustees may from time to time determine.

Section 1.04. Seal.

The seal of the Corporation shall contain the name of the Corporation and the year of its incorporation and shall be in the form of the seal impressed in the margin hereof.

ARTICLE II

PURPOSES OF THE CORPORATION

Section 2.01. Scope.

The Corporation is organized exclusively for charitable and educational purposes in the public interest within the meaning of § 501(c)(3) of the Internal Revenue Code. No part of the net earnings of the corporation shall inure to the benefit of, or be distributable to its trustees, Trustees, officers or other private persons, except that the corporation shall be authorized and empowered to pay reasonable

compensation for services rendered and to make payments and distributions in furtherance of Section 501(c)(3) purposes. No substantial part of the activities of the corporation shall be the carrying on of propaganda, or otherwise attempting to influence legislation, and the corporation shall not participate in, or intervene in (including the publishing or distribution of statements) any political campaign on behalf of, or in opposition to, any candidate for public office. Notwithstanding any other provision of these articles, the corporation shall not carry on any other activities not permitted to be carried on (a) by a corporation exempt from Federal income tax under Section 501(c)(3) of the Internal Revenue Code (or corresponding section of any future Federal tax code). Upon dissolution of this corporation assets shall be distributed for one or more exempt purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code (or corresponding section of any future Federal tax code) or shall be distributed to the Federal government, or to a state or local government, for a public purpose.

#### Section 2.02. Purposes.

The Corporation is organized exclusively for charitable and educational purposes in the public interest within the meaning of § 501(c)(3) of the Internal Revenue Code, including, but not limited to, the operation of a Florida public charter school, known as Saint Augustine Public Montessori School. It is the Corporation's intention to teach by what is generally known as the Maria Montessori Method. The term "school" is intended to include all of the activities, educational, social or otherwise, that may be carried on or conducted by such a school. The Corporation may lease, rent, purchase or construct facilities for carrying on such activities. The Corporation may apply for and receive public funding and may seek and accept private donations to further its educational and charitable purposes. Within the context of the Montessori educational philosophy, the Corporation will strive for age, sex, ethnic, racial, and socioeconomic diversity, and will seek to nurture the potential of every child to become intrinsically motivated and to love learning now and for a lifetime.

#### Section 2.03. Non-Discrimination.

The Corporation shall be non-religious and not discriminate on the basis of race, religion, national origin, gender, marital status, sexual orientation, educational affiliation, handicap status or age in either the hiring and other employment practices of the school or in its admission policies for students. Further, the school shall be open to all students in its authorized geographic area on a space available basis and shall not discriminate in its admission policies or practices. The Corporation shall conduct all of its activities in accordance with all applicable local, state, and federal anti-discrimination laws, as well as in accordance with all other laws and regulations applicable to the operation of charter public schools in the State of Florida., and shall comply with all applicable laws and regulations relating thereto.

### ARTICLE III

#### MEMBERS OF THE CORPORATION

##### Section 3.01. Non-membership Corporation.

The Corporation shall have no members. The Trustees shall have all powers and duties for the conduct of the activities of the Corporation.

## ARTICLE IV

### BOARD OF TRUSTEES

#### Section 4.01. General Powers

The affairs of the Corporation shall be managed by its Board of Trustees (hereinafter sometimes referred to as the "Board", and each member shall be referred to as a "trustee"), or as delegated by the Board of Trustees in accordance with these Bylaws. The Board of Trustees shall have all powers and authority, as designated in the Charter, for the management of the business, property, and affairs of the Corporation, to do such lawful acts as it deems proper and appropriate to promote the objectives and purposes of the Corporation. The Board of Trustees shall select a Director/Principal to administer the affairs of the school, on such terms and conditions as the Board of Trustees may from time to time determine. In addition, an affirmative vote of a majority of the members of the Board of Trustees, duly recorded, showing how each member voted, shall be required in order to take action on the following subjects:

- School Calendar;
- Appointment or Dismissal of Administrators;
- Adoption of the annual budget;
- Purchase , sale, or lease of land or facilities;
- Location on new buildings or change of the locations of old ones;
- Creation or increase in indebtedness;
- Adoption of courses of study;
- Designation of depositories for school funds;
- Entrance into contracts of any kind where the amount involved exceeds \$200.00;
- Determination of salaries or compensation of administrators, teachers, or other employees of the School;
- School Charter Application;

#### Section 4.02. Qualifications

Each trustee shall be an individual of full voting age and endorse and fully support the stated mission and vision of the Corporation.

#### Section 4.03. Number

The Board shall consist of not less than five or more than eleven trustees as may be fixed from time to time by the Board.

#### Section 4.04. Administrative Representation on the Board of Trustees

The school's Director/Principal shall serve as an ex officio nonvoting Member of the Board of Trustees.

#### Section 4.05 - Parent Member Representation on the Board of Trustees

There shall be between two (2) and four (4) parent Trustees elected to the Board of Trustees with the exact number to be established from time to time by the Board of Trustees. They shall be elected at each annual election, for three year staggered terms.

#### Section 4.06. Term

Trustees shall be elected for three year terms. Terms shall be staggered so that no more than one third (1/3) of the Board shall be up for election in any year, unless a vacancy(ies) needs to be filled. All trustees shall hold office for three (3) years from the time of their election and thereafter until their respective successors are chosen and qualified; provided, however, that the parent/guardian representatives may hold office only so long as the parent or guardian has a child properly enrolled at the School.

#### Section 4.07. Trustees Emeritus

The Board may elect as Trustees Emeritus former trustees, who have provided many years of distinguished service to the Corporation and who are unlikely to seek election to the Board at a future date. Trustees Emeritus may attend and participate in meetings of the Board but shall not vote or be counted toward a quorum.

#### Section 4.08. Election of Trustees

The trustees shall be elected for a three (3) year term by the presiding Board of

Trustees. Trustees shall be elected by a plurality of the votes cast. Trustees may be re-elected to successive terms. The Corporation will use the following schedule for the election of Trustees. All activities discussed in this schedule will take place at the principal place of instruction, unless the Board of Trustees shall determine otherwise.

##### (a) Appointment of a Nominating Committee

A Nominating Committee shall be appointed by the President and be comprised of not fewer than three (3) Trustees. Only Trustees may be members of the Nominating Committee. The members of the Nominating Committee shall include the Director/Principal, the President, and at least one parent Trustee. The President of the Board may appoint additional Trustees to the Nominating Committee.

##### (b) Responsibilities of the Nominating Committee

The Nominating Committee will be responsible for identifying and interviewing candidates to fill Board vacancies and annually recommending a slate of qualified candidates to the Board. The Nominating Committee shall also nominate officers for election at the September meeting of the Board of Trustees.

##### (c) Due Date for Nominating Petitions

An individual who seeks to be nominated to be a Trustee by the Nominating Committee shall file a biographical form in the school's main office by the Friday prior to the date for "Board Interviews"



scheduled on the school calendar. Forms shall be obtainable from the school's main office and/or from the Secretary or his or her nominee, at any reasonable time. The Nominating Committee will have the discretion to consider late petitions.

(d) Interviews of Candidates for Trustees

All candidates for Trusteeship shall be interviewed by the Nominating Committee on the dates for "Board Interviews" scheduled on the school calendar. Additional interview dates may be scheduled as needed.

(f) Board Approval of Candidates

All candidates recommended by the Nominating Committee shall be submitted for election to the Board of Trustees. In the event any of the proposed nominees are not approved by the Board, the Nominating Committee shall have the option to recommend replacement nominees or leave a position(s) vacant.

Section 4.09. Vacancies.

A vacancy on the Board of Trustees, including a vacancy caused by an increase in the number of trustees, may be temporarily filled by a majority vote of the remaining Trustees to elect a person(s) to fill the vacancy(ies) until the next annual meeting of Trustees, at which time trustees so elected must be re-elected as specified in the Bylaws or step down from the Board as soon as his or her successor is duly elected and qualified.

Section 4.10. Compensation.

Trustees receive no payment for their services. With board approval, trustees may be reimbursed for out-of-pocket expenses incurred on approved board business. Trustees must present receipts for all such expenses, which shall be for the trustee only, and shall be itemized and documented. Such expenses must be approved by a motion of the board at the meeting immediately following the expenditure(s). Each year, at the annual meeting, the Board of Trustees shall set a schedule of allowable charges for meals, lodging, and mileage expended on board business. Reimbursements shall not exceed these limitations.

Section 4.11. Meeting Attendance.

Trustees are expected to attend all Board meetings. It shall be the duty of the Secretary of the Board to communicate with any trustee after such trustee's two unexcused, consecutive absences to ascertain the trustee's interest in retaining Board membership. Failure to provide an adequate response may qualify as sufficient cause for removal from the Board of Trustees.

Section 4.11. Resignation and Removal of Trustees.

(a) Removal.

Any trustee may be removed at any time for cause at any meeting of the

Board by a vote of the Board of the Corporation called for that purpose. A Trustee shall be removed by a majority vote of the remaining trustees for failure to organize or for neglect of duty. Trustees shall be expected to attend at least 9 board meetings per year (September-August), provided however, that no board member shall miss more than two consecutive meetings and remain on the board. A trustee who fails to attend at least 9 board meetings per year or misses more than two consecutive meetings (September-August) may be removed by majority vote of the remaining members of the Board of Trustees. In addition, trustees shall be expected to attend at least 80% of all meetings of the committees on which he/she has agreed to serve as determined on an annual basis. A trustee who fails to attend at least 80% of all meetings of the committees on which he/she has agreed to serve as determined on an annual basis may be removed by majority vote of the remaining members of the Board of Trustees.

(b) Resignation.

Any trustee may resign at any time.

## ARTICLE V

### MEETINGS OF THE BOARD

#### Section 5.01. Annual Meeting.

An annual meeting of the Board of Trustees for the election of Trustees and Officers and such other business as may come before the meeting shall be held in September of each year. Written notice shall be given not less than ten (10) days in advance of the time, place, and purposes of the meeting. The meeting shall be held at the principal location of the Corporation or such other place as shall be specified in the meeting notice. The notice shall comply with the Open Public Meetings Act.

#### Section 5.02. Regular Meetings.

The Board shall meet monthly. Meetings of the Board shall be general meetings and open for the transaction of any business within the powers of the Board without special notice of such business except in any case where special notice is required by law or by the Bylaws.

#### Section 5.03. Special Meetings.

Special meetings of the Board shall be called at any time by the Secretary, upon either the written request of the President or three members of the Board.

#### Section 5.04. Place and Time of Meetings.

All meetings of the Board shall be held at such places within or without the State of Florida and at such times as shall be specified in the respective notices of such meetings or waivers thereof.

#### Section 5.05. Notice of Meetings.

Written notice shall be given not less than ten (10) days in advance of the time, place, and purposes of the meeting. No notice of the time, place or purpose of any meeting need be given to any Trustee who

attends such meeting or to any Trustee who in writing, executed and filed with the records of the Corporation, either before or after the holding of such meeting, waives such notice. Notice of meetings of the Board shall also be posted in the school and given to the public. Public notice shall, however, not be required in the case of emergency meetings or a conference.

#### Section 5.06. Open Meetings.

All official actions and all deliberations by a quorum of the Board or any committee of the Board shall take place at a meeting open to the public except in cases where executive sessions are authorized. Generally speaking, the Board may conduct in executive session meetings or portions of meetings devoted solely to matters involving (a) discussions of employment, appointment, termination of employment, terms and conditions of employment, evaluation of performance, promotion or discipline of any specific prospective or current or former employee; (b) discussions of employment labor relations or arbitration; (c) discussions of the purchase or lease of real property; (d) consultation with the Corporation's attorney or other professional advisors regarding litigation or potential litigation; (e) discussions of confidential information regarding current, prospective or former students (f) discussion of the Corporation's business which if conducted would violate a lawful privilege or lead to the disclosure of information or confidentiality protected by law.

#### Section 5.07. Quorum.

At all meetings of the Board the presence of one-half of the trustees shall be necessary and sufficient to constitute a quorum and except as otherwise provided by law or by the Bylaws, the act of a majority of the Trustees present shall be the act of the Board. In the absence of a quorum, no business shall be transacted except to take measures to obtain a quorum, fix a time to adjourn, adjourn, or to take a recess.

#### Section 5.08. Minutes of Meetings.

Minutes of the meeting will be kept by the Board Secretary. If the Secretary is not present, the Board Member conducting the meeting will designate a Board Member to keep minutes for that meeting.

#### Section 5.09. Motions.

The Board of Trustees shall only consider motions presented by a member of the Board. The Board of Trustees may vote on motions presented at any meeting where a quorum is present. Unless otherwise provided herein, motions shall be adopted when a majority of the quorum present at a meeting votes in favor of the motion.

#### Section 5.10. Management of Meetings.

All Board meetings, including regular, closed and/or special meetings, will be conducted by the President of the Board. If the President is not present, the Vice-President will conduct the meeting. If neither the President nor Vice-President is present, the attending Trustees will select, by a majority vote, a Trustee

who is present to conduct the meeting. The most recent edition of Robert's Rules of Order shall, to the extent consistent with these Bylaws, govern the proceedings of these meetings.

Section 5.11. No Proxies.

Any vote by a Trustee must be made in person and not by proxy.

Section 5.12. Manner of Acting.

The act of a majority of the Trustees present at a meeting at which a quorum is present shall be the act of the Board of Trustees, except where otherwise provided by law, by corporate charter, by articles of incorporation, or by these Bylaws.

Section 5.13. Consent In Lieu of Meeting of Trustees.

Any action required to be taken, or which may be taken, at a meeting of the Board of Trustees may be taken without a meeting if a consent in writing setting forth the action so taken is given by three-fourths (3/4) of the Trustees entitled to vote with respect to the subject matter thereof. The action taken shall be effective when three-fourths (3/4) of the Trustees have approved the consent unless the consent specifies a different effective date. Any consent given by three-fourths (3/4) of the Trustees shall have the same effect as an affirmative vote and may be stated as such in any document filed with the Secretary of State or elsewhere. The consent shall be immediately filed in the corporate minute book. A consent must be signed to be valid. Actual, facsimile, or electronic signature (e.g., /s/) shall be permitted.

Section 5.14. Availability of Minutes.

Copies of the minutes, including those from closed sessions, shall be kept with the official Corporate documents. All minutes, except those from closed sessions, of the Board of Trustees meetings shall be made available upon request in the school office.

## ARTICLE VI

### OFFICERS

Section 6.01. Officers.

The officers of the Corporation shall be President, Vice-President, Treasurer, and Secretary. The Board of Trustees may elect or appoint such other officers as it shall deem desirable, which officers shall have authority to perform the duties prescribed, from time to time, by the Board of Trustees.

Section 6.02. Election of Officers.

The officers shall be elected annually at the first meeting of the Board of the operating year, if possible, or, if not possible, then as soon thereafter as possible. They shall be elected by a plurality of the votes cast and may succeed themselves in office. Each person elected an officer shall continue in office for one year after his election or until his successor shall have been duly elected and qualified or until his earlier death, resignation or removal in accordance with the Bylaws. Every elected officer must be a Trustee.

#### Section 6.03. Removal.

Any officer or agent elected or appointed by the Board of Trustees may be removed by the Board of Trustees whenever the Board of Trustees determines that such removal will serve the best interests of the Corporation.

#### Section 6.04. Officer Vacancies.

Vacancies of officers caused by death, resignation, removal or increase in the number of officers may be filled by a majority vote of the quorum present at a special meeting called for that purpose or at any regular meeting. Only current Trustees are eligible to fill a vacancy. In the event of a vacancy in the office of President, unless or until an acting President is appointed, the Vice President shall assume the duties of the President.

#### Section 6.05. President.

The President shall be the chief executive officer of the Corporation, responsible, along with his/her fellow Trustees, for the oversight of its business and affairs.

He/she shall preside at all meetings of the Board and shall serve as chairperson of the Board of Trustees.. The President shall have full and equal vote as accorded to all trustees. The President may enter into and execute in the name of the Corporation contracts or other instruments that are authorized by the Board of Trustees. The President may delegate, as needed, to any other officer any or all of the duties of the office of President. He/she shall have such other powers and duties as may be prescribed by the Board of Trustees or by these By-laws. Except as otherwise provided herein, the President shall be an ex-officio member without vote of all committees of the Corporation or any of its constituent bodies.

#### Section 6.06. Vice President.

The Vice President shall have such duties and responsibilities as may be delegated to him/her by the President. The Vice President shall have full and equal vote as accorded to all trustees. In the absence of the President, the Vice President shall perform all the duties of the President and, when so acting, shall have all the responsibilities of and be subject to all the restrictions as fall upon the President, including presiding at meetings of the Board of Trustees. He/she shall have such other powers and duties as may be prescribed by the Board of Trustees or by these By-laws.

#### Section 6.07. Treasurer.

The Treasurer shall be the chief financial officer of the Corporation and shall have oversight of the Accountant or Business Administrator that takes responsibility of the financial records, investments, and other evidences of school properties and assets. The Treasurer shall ensure that the Accountant/Business Administrator keeps regular books of account for the Corporation that set out business transactions of the Corporation and ensure that such books to be at all times open to inspection at their place of keeping to any Board of Trustee member. The Treasurer shall be a member of the Finance and Development Committee. The Treasurer shall have charge and custody of, and shall be

responsible for, all funds and securities of the Corporation; shall cause to be received and cause the receipts to be given for moneys due and payable to the Corporation from any source whatsoever, including local, state and federal funds, and privately donated funds. The treasurer shall also make payments out of the same in proper orders approved by the Board of Trustees, signed by the president or vice-president of the board. The treasurer may pay out such funds on orders that have been properly signed without prior approval of the Board for the payment of amounts owing under any contracts that have been previously approved by the board, and by which prompt payment the School will receive a discount or other advantage. The Treasurer shall cause an audit of the books and accounts to be conducted annually by independent auditors; shall cause the proper tax returns and annual reports to be timely filed with the proper authorities; and shall generally cause to be performed all the duties incident to the office of Treasurer, together with such other duties as from time to time may be assigned to him or her by the President or by the Board of Trustees. In the absence of action by the Board of Trustees to the contrary, the Treasurer shall cause to be invested any funds not required for current operation in appropriate investments. In the event the Board of Trustees designates specific investments or rules with respect to same, the Treasurer shall abide by such designations. The Treasurer shall render to the Board of Trustees and the members of the school community, at the Annual Meeting, statements evidencing the current financial condition of the Corporation.

#### Section 6.08. Secretary.

The Secretary of the Board of Trustees shall keep or cause to be kept the minutes of all meetings of the Board, including the time and place, the names of those present, the actions taken, and the votes on such actions. The Secretary shall present the minutes of the previous meeting at the subsequent meeting to be voted on by the Board and duly noted in the minutes of the instant meeting. The Secretary shall see that all notices are duly given in accordance with the provisions of these Bylaws or as required by law. He/She shall see that the corporate records and the seal of the Corporation are kept; shall see that the seal of the Corporation is affixed to all documents, the execution of which on behalf of the Corporation under its seal is duly authorized or required in accordance with the provisions of the law or of these Bylaws. He/She shall see that a register is kept of the post office address of each Trustee which shall be furnished to the Secretary by such Trustee; shall see that Schedule A to these Bylaws (the list of Committees) is kept current and is updated, posted, and circulated as appropriate; and shall generally perform or direct the performance of all duties incident to the office of Secretary and such other duties as from time to time may be assigned to the Secretary by the President or by the Board of Trustees.

### ARTICLE VII

#### COMMITTEES

#### Section 7.01. Establishment of Committees.

There shall be such committees as the Board of Trustees or the President shall establish. The committees shall be identified in Schedule A to these Bylaws. Schedule A shall be updated at least annually. The Board Secretary shall maintain the list of committees. Changes to Schedule A shall be exempt from the

Amendment procedure set forth in these Bylaws. Schedule A will specify the committees that typically hold meetings in closed session. The President shall recommend to the Board a list of proposed committees to be included in Schedule A at the September Board meeting. The Board must approve the creation or continuation of each committee by a majority vote of a quorum of the Trustees. The President will advise the Board of committees formed after the September Board meeting at the next regular Board meeting following the creation of such committees. Unless otherwise expressly specified in these Bylaws, a committee shall include at least one Trustees. Committees serve at the pleasure of the Board of Trustees. The President shall designate who is to serve as chairperson of each committee, and shall advise the Board of Trustees of each such designation. The Board of Trustees, by a majority vote of quorum of Trustees, may override such designations.

#### Section 7.02. Standing Committees.

Each standing committee shall have a charge specific to its permitted activities. The function of any committee so established shall be fact-finding, deliberative, and advisory to the Board of Trustees. Committees shall not have authority to take legislative or administrative actions, nor to adopt policies for the school. The president shall be an ex- officio member of each committee. The Director/Principal of the School shall be an ex- officio member of each committee, except where his/her evaluation, tenure, or salary are to be deliberated. Standing committees shall be defined in Schedule A.

#### Section 7.03. Ad Hoc Committees.

Each ad hoc committee shall have a charge specific to its permitted activities and that charge shall include the date on which the committee is to present its final report to the Board of Trustees and be dissolved. Members of ad hoc committees shall be drawn from those parents and staff of the school community who indicate interest in serving on the ad hoc committee and from such others as may be deemed appropriate by the Board of Trustees. Trustees shall not be eligible to serve on ad hoc committees, since they have authority and responsibility to review the committee's recommendations and adopt them or not.

#### Section 7.04. Committee Procedures.

Subject to these Bylaws or action by the Board of Trustees, the committee shall determine the time and place of meetings, the notice required therefore, and the committee's rules of procedure.

#### Section 7.05. Reporting Obligations.

Committee chairpersons shall report to the Board of Trustees, as necessary, concerning the activities of their committees at the Board's monthly meetings. Committee chairpersons shall provide a written report to be presented at the November and April meetings, except as otherwise determined by the Board President.

Section 7.06. Committee Powers.

A committee shall have such power and authority as the Board of Trustees may designate. In the absence of any delegation of authority, a committee may make recommendations to the Board of Trustees for implementation.

Section 7.07. Closed Committee Meetings.

Any committee meeting dealing with personnel issues, conflict of interest, grievance issues, financial issues, personal information of a staff member, or other matters where it is important to maintain the confidentiality of the matter being discussed may be closed to all but members of the Committee by majority vote of the committee quorum present.

Section 7.08. Committee Members.

Committees may expand their membership without Board approval. A committee may appoint additional members, as it deems appropriate for its purposes. Although not subject to Board approval, the chair of any committee shall inform the President of the identity of additional members as soon as practicable after appointment and such members shall be added to the official roster for such committee.

Section 7.09. Removal from Committees.

Any member of a committee may be removed by the person or persons authorized to appoint such member whenever in their judgment the best interests of the Corporation shall be served by such removal.

Section 7.10. Committee Terms of Office.

Each member of a committee shall serve from the date of initial appointment until the next Board meeting at which the membership roster of such committee is presented by the President to the Board for approval or until his or her successor is designated, unless the committee shall be sooner terminated.

## ARTICLE VIII

### CONTRACTS, FISCAL YEAR, CHECKS, DEPOSITS, FUNDS

Section 8.01. Contracts.

The Board of Trustees may authorize any officers or agents of the Corporation, in addition to the officers so authorized by these Bylaws, to enter into any contract or execute and deliver any instrument in the name of, and/or on behalf of, the Corporation, and such authority may be general or confined to a specific instance. All counterparties to a material contract or instrument (as defined in the Corporation's conflict of interest policy) shall be given a written copy of such conflict of interest policy and shall return a signed acknowledgment of such receipt to the school's Finance Director.



#### Section 8.02. Fiscal Year and Audit.

The fiscal year of the Corporation shall be July 1st to June 30th. The Treasurer of the Corporation or their designee shall be required periodically and no less than once a year to employ a certified public accountant to audit the accounts of the Corporation.

#### Section 8.03. Checks, Drafts and Monetary Instruments.

All checks, drafts or other orders for the payment of money, notes or other evidences of indebtedness issued in the name of the Corporation shall be signed by such officer (s) or agent (s) of the Corporation, and in such manner, as shall from time to time be determined by resolution of the Board of Trustees. In the absence of such determination by the Board of Trustees, such instruments shall be signed by the President or the Treasurer of the Corporation, or the Vice-President, if the President is unavailable.

#### Section 8.04. Deposits.

All funds of the Corporation shall be deposited from time to time to the credit of the Corporation in such banks, trust companies or other depositories as the Board of Trustees or agents of the Corporation designated by the Board of Trustees may select. The treasurer shall make a monthly report to the Board of Trustees detailing the amount of funds received and disbursed by him or her during that past month.

#### Section 8.05. Gifts.

The Board of Trustees may accept on behalf of the Corporation any contribution, gift, bequest or devise for the general purposes, or for any special purpose, of the Corporation.

#### Section 8.06. Investments.

The Board of Trustees shall invest its funds consistent with sound business practices. The Board of Trustees may invest in the following authorized investments: United States Treasury bills; short-term obligations of the United States Government or its agencies or instrumentalities; deposits in savings accounts or time deposits or share account of institutions insured by the Federal Deposit Insurance Corporation or the Federal Savings and Loan Insurance Corporation or the National Credit Union Share Insurance Fund to the extent that such accounts are so insured, and for any amounts above the insured maximum, provided that approved collateral as provided by law therefore shall be pledged by the depository; obligations of the United States of America or any of its agencies or instrumentalities backed by the full faith and credit of the United States of America, the State of Florida or any of its agencies or instrumentalities backed by the full faith of the State, or of any political subdivision of the State of Florida of any of its agencies or instrumentalities backed by the full faith and credit of the political subdivision; shares of an investment company registered under the Investment Company of America Act of 1940.

## ARTICLE IX

### CONFLICTS OF INTEREST POLICY

The Corporation shall have and the Board shall approve a conflicts of interest policy, and such procedures as the Board shall determine are appropriate for maintaining and enforcing such policy for the benefit and protection of the Corporation.

## ARTICLE X.

### AMENDMENTS

#### Section 10.1. Articles of Incorporation.

The Articles of Incorporation of the Corporation may be amended by a two-thirds majority of the Trustees at any duly convened meeting. Notice of such a vote shall be provided in writing not less than ten (10) days prior to the meeting and shall include a copy of the proposed amendment or a summary of the changes.

#### Section 10.2. Bylaws.

The Bylaws may be amended by a two-thirds majority of the Trustees at any duly convened meeting, or to the extent not prohibited by law, by vote of the majority of all trustees in office at a duly convened meeting of Board, after notice of such purpose has been given, including a copy of the proposed amendment or a summary of the changes to be effected thereby.

## ARTICLE XI.

### MISCELLANEOUS PROVISIONS

#### Section 11.01. Use of Internet or Phone Conference.

One or more persons may participate in a meeting of the Board, or of any Committee body by means of conference telephone or internet conference or similar communications equipment by means of which all persons participating in the meeting can hear each other. Participation in a meeting pursuant to this section shall constitute presence in person at such meeting.

#### Section 11.02. Headings.

In interpreting these Bylaws, the headings of articles shall not be controlling.

## ARTICLE XII.

### INDEMNIFICATION

#### Section 12.01. General.

The Corporation shall indemnify each officer, trustee, employee and representative ("Indemnity") from the expenses and risks as set forth in Sections 2 and 3 below if such Indemnity has acted in good faith or in a manner which he or she reasonably believed to be in or not opposed to the best interests of the Corporation and with respect to criminal action or proceeding had no reasonable cause to believe his or her conduct was unlawful.

#### Section 12.02. Expenses.

Indemnities shall be indemnified against all expenses (including attorney's fees), judgments, fines and amounts paid in settlement actually and reasonably incurred by the Indemnity in connection with any threatened, pending or completed action, suit or proceeding whether civil, criminal, administrative or investigative (other than an action by or in the right of the Corporation) by reason of the fact that the Indemnity is or was a representative, officer or Trustee of the Corporation, or is or was serving at the request of the Corporation as a representative of another corporation, partnership, joint venture, trust or other enterprise.

#### Section 12.03. Advances.

The Corporation shall advance to all Indemnities all expenses incurred in defending a civil or criminal action, suit or proceeding in advance of final disposition of such action provided the Board determines that it is more likely than not that the Indemnity will be entitled to indemnification pursuant to Section I of this Article VII and such Indemnity agrees to repay such amount if it is ultimately determined by the Board that the Indemnity is not permitted to receive indemnification under Subchapter D or the Non-Profit Corporation Law of 1988.

## ARTICLE XIII.

### LIMITATION OF PERSONAL LIABILITY

#### Section 13.01. Personal Liability.

A trustee of the Corporation shall not be personally liable for monetary damages for any action taken or any failure to take any action, unless (a) such Trustee has breached or failed to perform his duties as a Trustee, including his duties as a member of any committee of the Board upon which he may serve, pursuant to the standard of care set forth in Section 2 of this Article X, and (b) such breach or failure to perform constitutes self-dealing, willful misconduct, or recklessness.

Section 13.02. Standard of Care.

Each Trustee of the Corporation shall stand in a fiduciary relation to the Corporation and shall perform his duties as a Trustee, including his or her duties as a member of any committee of the Board upon which he or she may serve, in good faith, in a manner he or she reasonably believes to be in the best interests of the Corporation, and with such care, including reasonable inquiry, skill and diligence, as a person of ordinary prudence would use under similar circumstances. In performing his or her duties, a Trustee shall be entitled to rely in good faith on information, opinions, reports or statements, including financial statements and other financial data, in each case prepared or presented by any of the following:

- (1) One or more officers or employees of the Corporation whom the trustees reasonably believe to be reliable and competent in the matters presented.
- (2) Counsel, public accountants or other persons as to matters that the Trustee reasonably believes to be within the professional or expert competence of such person.
- (3) A committee of the Board, upon which he does not serve, duly designated in accordance with the law, as to matters within its designated authority, which committee the Trustee reasonably believes to merit confidence. A Trustee shall not be considered to be acting in good faith if he or she has knowledge concerning the matter in question that would cause his reliance to be unwarranted. Absent breach of fiduciary duty, lack of good faith or self-dealing, actions taken as a Trustee or any failure to take any action shall be presumed to be in the best interests of the Corporation.

CERTIFICATION OF SECRETARY

I, the undersigned, do hereby certify:

1. That I am the duly elected Secretary of Saint Augustine Montessori Community, a Florida non-profit Corporation;
2. That the foregoing Bylaws comprising seventeen (17) pages constitute the Bylaws of said Corporation as duly amended and adopted by the Board of Directors thereof on \_\_\_\_\_.

IN WITNESS WHEREOF, I have hereunto subscribed my name and affixed the seal of said Corporation this \_\_\_\_\_ day of \_\_\_\_\_.

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Secretary

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President

## SCHEDULE A

### STANDING COMMITTEES

#### Governance Committee

The purpose of the Governance Committee is to make recommendations regarding Board recruitment, nominations, orientation, training, and evaluation in accordance with the Bylaws of the school as well as established Board policies. The Committee is also responsible for developing and revisions to the Board Handbook as needed. This Committee shall make recommendations to the Board to take action on the following:

- Revisions to the nomination/Board election procedures.
- Revisions to the procedures for Board recruitment.
- Recommend and keep current an orientation and training plan for new Directors.
- Assess and recommend Board training needs.
- Document training completed by Directors.
- Analyze the skills and experience needed on the Board.
- Recruit members to serve as Directors of the Board and develop a slate of candidates for consideration by the membership. The Nominating Committee will work out of this Committee.
- Coordinate training aspects of Board retreats as needed.

#### Curriculum Committee

The Curriculum Committee shall ensure that the School's curriculum effectively implements the Montessori Method of instruction and learning as well as the School's mission and guiding principles. The Curriculum Committee shall review and recommend revisions to the curriculum of the School as necessary. The Curriculum Committee shall also recommend subscriptions to relevant and appropriate journals and magazines geared to curriculum. It shall also keep the board abreast of new ventures in the world of innovative schools and maintain a file of instructional and professional resources available to the Board of Trustees, the administration, the families and the community. The Curriculum Committee will recommend criteria for the evaluation of the performance of the employees of the School and shall recommend the hiring, firing, disciplinary actions as well as salaries and bonuses for the Saint Augustine Public Montessori School's employees. The Curriculum Committee shall also assist in planning Board, staff and parent educational and development programs.

#### Finance and Development Committee

The Finance and Development Committee shall organize budget materials for the accountant or auditor's review and present the budget for final approval of the Board of Trustees. It shall report to the Board of Trustees regularly regarding the receipt and expenditures of any of the School's monies. The Finance and Development Committee shall develop and carry out fund-raising activities, solicit gifts and/or grants for school purposes and programs. It will work to create and maintain collaborative relationships within our community and obtain philanthropic resources to forward the strategic

objectives of the school. The Finance and Development Committee will research grants for which the school is eligible to apply and identify grants that the School has the highest chance to meet the requirements and receive funding.

#### Facilities Committee

The Facilities Committee is responsible for researching, evaluating options and bringing well thought-out proposals to the Board of Trustees regarding the location of the School; School building needs and options; design and construction of outdoor playspace, classroom, and gardens; options for food services; and local permitting requirements and proposing options for compliance with local planning, zoning, health, parking and other local regulations. The Facilities Committee will be responsible for annually evaluating the options and needs for providing transportation services. In its research and evaluation duties, the Facilities Committee will consider health and environmental criteria and will present the health and environmental impacts of each option in their proposals to the Board. Participation in certification programs such as The Green Schools Alliance, Adopt-a-Wetland, or community garden activities will be considered by the Facilities Committee.

#### Community Relations Committee

The Community Relations Committee is responsible for developing ties and partnerships with the local community and business. It is responsible for fostering and enhancing the community of SAPMS including families of existing and prospective students, teachers and staff, and other Saint Johns County community members interested in supporting our mission. Key responsibilities include:

- Publishing the Annual Report and newsletter
- Management of the school's website
- Public relations
- Working with other committees and the Director/Principal to effectively communicate their projects
- Developing and disseminating marketing materials to educate the community about the School and for recruitment
- Development of graphics for use in marketing the School

#### Grievance Committee

In accordance with Florida law, the Board of Trustees shall establish a Grievance Committee comprised of both parents and teachers to make non-binding recommendations to the Board of Trustees concerning the disposition of complaints. The Grievance Committee shall have four members who will serve one year terms, with one member designated as chairperson by the other committee members. Committee members shall be appointed each year at the first Board of Trustees meeting following the annual meeting. Grievance Committee members may serve no more than two consecutive terms on the committee.

## APPENDIX

### D. Biographies of SAMC Founding Board Members

#### Irene Arriola

Ms. Arriola has practiced real estate full-time in St Augustine and St Johns County for over 14 years. From the outset, she recognized the unique aspects and free-spirited nature of the area, and so associated herself with independent firms like Saltwater Property Group that had the flexibility and imagination to meet the challenges of providing top-notch services for such a community and its consumers.

The result of this personal business plan has consistently placed Ms. Arriola among the top five producers in the county. Her marketing skills have put her services and her properties at the top of nearly everyone's list, and her talent for turning a phrase and bringing descriptions to vibrant life has taken print advertising to the level of art.

Not one to take without giving back, Ms. Arriola is generous with her community service. She provides the Council on Aging with pro-bono representation on a regular basis. She serves on the City of St Augustine Code Enforcement Adjustment and Appeals Board, where she has been seated for six years and is currently Chairperson. From time to time she acts a Realtor for the City of St Augustine as well. She is also Secretary for the St Johns Housing Partnership, Director for the St Johns Cultural Council and a member of the Old City Life Advisory Board.

In 2009, Ms. Arriola was selected by her peers to be honored as Realtor of the Year, and her proudest achievement remains the O E Barnes Humanitarian Service Award presented by that group.

A cum laude graduate of Hofstra University in Long Island, NY, she explored her diverse interests by studying theatre, philosophy, English and American literature, Russian and Spanish while earning her degree in business.

“Education is the vessel that carries the hopes of civilization into the future. We need to do everything possible to expedite the journey.” For Ms. Arriola, education is a lifelong journey and to-date it has been an interesting trip.

The daughter of a former ballerina with the Ballet Russe de Monte Carlo and of a journalist with El Dia in Mexico City, Ms. Arriola has spent her life immersed in music, dance, poetry, and prose. Married to a musician and songwriter, she also acts as his agent and creative muse.

#### Jeannie Buskirk

Ms. Buskirk has more than 20 years of experience as a Montessori educator. She received her Montessori Certificate from the London Montessori Centre in London, England, in 1989. She holds a Bachelor's degree (Spanish with a minor in Early Childhood Education) from the University of Texas and a Master's degree in Early Childhood Education from the University of Florida.

Ms. Buskirk established the Moultrie Montessori School, the first Montessori school in St. Johns County, in 2008. From 2006-2007, she was the Principal/Lead Teacher at the Healthy Learning Academy, a public charter school that she opened in Alachua County. The students there achieved the highest scores in reading and second highest in math in the county.

From 1997-2006, she worked with the Board of Directors and the Town of Micanopy, Florida, to open one of the first charter schools in Florida, the Micanopy Area Cooperative School. In addition to supervising teachers and aides, interviewing and making recommendations for hiring, reporting to the board of directors, and developing the curriculum, she taught Kindergarten and first grade, looping from one year to the next. This school quickly became recognized as one of the best charter schools in Florida, consistently earning A grades. Ms. Buskirk established and maintained positive relations with community members to develop a strong presence for the school in the community and strong community involvement in the school.

Other teaching experience that Ms. Buskirk brings to the SAPMS includes the following tenures:

- Joyce Bullock Elementary School, Williston, Florida: long-term substitute, Kindergarten ESE inclusion classroom and ESOL kindergarten, January 1997-June 1997.
- Pioneer Montessori School, San Jose, California: Teacher, Interim Director, 1996
- Rainbow Montessori School, Sunnyvale, California: 1995-1996.
- Gainesville Country Day School, Gainesville, Florida: 1992-1993.
- Evangelischer Kindergarten, Mannheim, Germany: 1991-1992.
- Millhopper Montessori School, Gainesville, Florida: 1989-1991.
- Pegasus Learning Center, Gainesville, Florida: 1984-1989.

Ms. Buskirk has been awarded several prestigious grants:

- 2007: Implementation Grant from Florida Department of Education for program development at Healthy Learning Academy.
- 2005: Florida Learn & Serve Grant for 3rd-5th grade students to perform historical re-enactments.
- 2004: Florida Learn & Serve Grant for 3rd-5th grade students to write a children's book of the history of Micanopy.
- 2003: Zocklein & Associate Grant Writing Workshop, Tampa, Florida.
- 2002: Florida Department of Education and Florida Spain Alliance Grant to have a Spanish Teacher from Spain teach for one year at the Micanopy Area Cooperative School.
- 2001: Florida Department of Education, Drop-out Prevention: Scholarship for Teachers of Action Research to attend training seminars and conduct research in the classroom on the effects of brain compatible teaching.

In addition, she has developed the following workshop presentations:

- "Using Common Household Items to Develop Fine Motor Skills", P.K. Yonge School, Gainesville, Florida, February 1995.



- “Developing Fine Motor Coordination,” North Central Florida Association for the Education of Young Children, Gainesville, Florida, February 1995.
- “Science Experiments for Young Children,” North Central Florida Association for the Education of Young Children, Gainesville, Florida.

## Jean McDowell

Ms. McDowell has a diversified background in nonprofit organization management, law, science and federal, state and local government service. Because of her six-year-old daughters’ thriving experiences in Montessori education and her own experiences with Montessori, she has been inspired to teach at Moultrie Montessori School for the past three years, first as a volunteer and then as a part time Elementary teacher.

Ms. McDowell is a graduate of the public schools in Hattiesburg, Mississippi; Emory University; and Vermont Law School. Ms. McDowell has extensive experience in managing and enacting the policies and procedures of nonprofit organizations and facilitating effective Board management. She has 15 years of experience in environmental science, law, policy and planning. She has worked for the States of Mississippi and Georgia, the Cities of Savannah and Tybee Island, Georgia, and for all 50 state water management programs through her work with the Ground Water Protection Council. She has applied for and received grants from federal and state government as well as from private foundations. Her work as staff for local planning agencies in addition to serving as a Planning Commissioner provide a necessary understanding of local permitting requirements as well as the perspective to view the Montessori school as part of the greater St. Augustine community. Ms. McDowell is a staunch supporter of public education and believes that the only thing missing from St. Augustine is a Montessori school that everyone may attend.

## Carrie Morgan

Carrie Morgan is employed by the St. Johns County Public Library System. She spent several years working for the State of Florida’s Department of Elder Affairs, and then as a nursing home social worker before finding her professional niche among books and readers. Ms. Morgan received a Bachelor of Arts degree from West Virginia University, and holds a Master’s degree in Religious Studies from Florida State University. As a part-time professional gardener, Ms. Morgan co-designed and installed landscaping at both sites of the Moultrie Montessori School. She plans to landscape SAPMS using native plants, instilling in students a value for plant diversity and dooryard ecosystems. Ms. Morgan is passionate about the great outdoors and loves to see children enjoying Florida’s abundant natural beauty.

## Roman Pytel

Roman Pytel is a consultant. His clients include international logistic companies and transportation companies that conduct business around the world. At Hunter Marine, a Luhrs company based in Gainesville Florida, Mr. Pytel helped develop a national sales campaign that garnered millions of dollars in sales per year. Mr. Pytel founded the North Shore Baseball Academy in Highland Park, IL, which worked with kids of all ages. He used his coaching and business background to develop a hobby into a extremely successful and lucrative company. He created and developed “Camp Roamin’,” an adventure camp for both affluent and at-risk teens funded by private and governmental agencies. At this camp, youngsters gained life-skills, respect and self-esteem while still enjoyed being kids. His book, ADVENTURES OF A MUD HOG WRESTLER, written for young teens under the pseudonym of Treb Writeman, is a witty and sometimes philosophical look at the misadventures of a single, 20th-something-year-old American male living and working in the late 20th century. Mr. Pytel earned his Bachelor’s

Degree in Politics, Government and Religion at Ripon College in Wisconsin. Mr. Pytel is President of the Lighthouse Park Neighborhood and is committed to improving the welfare and good educational opportunities in the City of St. Augustine and the area.

### **Susan Brummer, Montessori Advisor to the Board and Curriculum Committee**

Ms. Brummer has a degree in Elementary Education from the University of Minnesota-Winona. She worked for her Montessori certification in ages 3-6 from Midwest Montessori Teachers Training Center in Chicago, Illinois. Her 6-9 certification is from the Dallas Montessori Training Center, Dallas Texas and she has a master's degree in Education with concentrations in Montessori and Analytical Teaching from Texas Wesleyan University, Ft Worth, Texas.

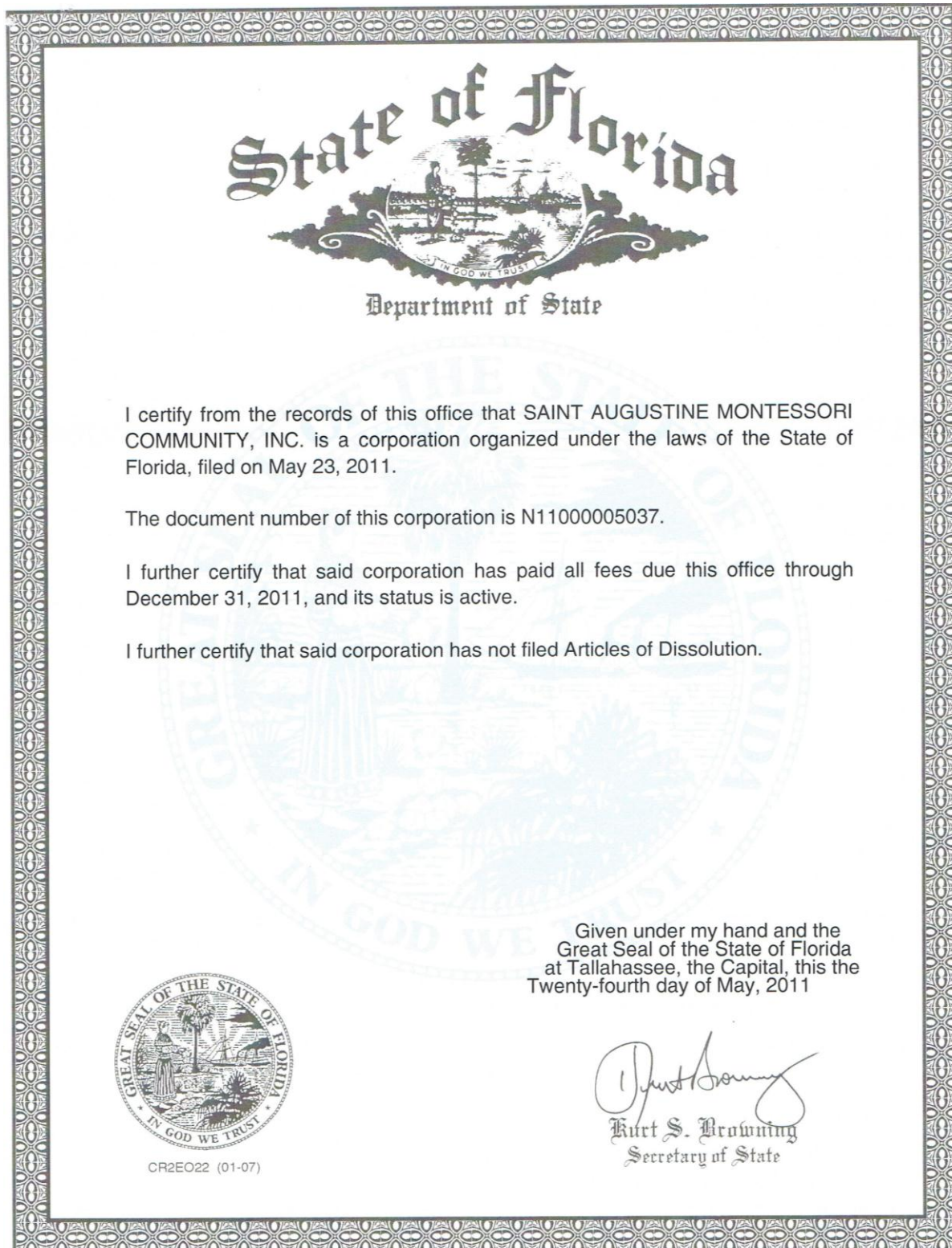
She has founded a number of schools and was the Head of School at Winona Montessori School, Winona Minnesota; West Bend Montessori School, West Bend, Wisconsin; Montessori Academy, Ft Worth, Texas; and Montessori Academy of the Mid-Cities, Bedford Texas, as well as a small school on an American Air Force Base in Spain.

Ms. Brummer has worked in Montessori education in many areas as a teacher, head of school, curriculum planner, teacher trainer, workshop presenter, and supervisor of interns. She also has provided consultation and accreditation of schools for the American Montessori Society. She has visited many AMS and AMI schools in this country and in Europe. She currently teaches at Moultrie Montessori School.

APPENDIX

**E. Articles of Incorporation**

The SAMC's Articles of Incorporation are reproduced in the following pages.



**ARTICLES OF INCORPORATION OF  
SAINT AUGUSTINE MONTESSORI COMMUNITY, INC.**

In compliance with Chapter 617, F.S., (Not for Profit)

**PREAMBLE**

The undersigned citizens of the United States, desiring to form a not for profit corporation under the Florida Not For Profit Corporation Act, Chapter 617, Florida Statutes, certify and acknowledge the following:

**ARTICLE I. CORPORATE NAME**

The name of the Corporation Not for Profit shall be Saint Augustine Montessori Community, Inc. (“Corporation”).

**ARTICLE II. DURATION**

The duration of the Corporation shall be perpetual.

**ARTICLE III. PRINCIPAL OFFICE & MAILING ADDRESS**

The principal office and mailing address of the Corporation shall be 268 Saint George Street, Saint Augustine, Florida, 32084

**ARTICLE IV. GENERAL AND SPECIFIC PURPOSE**

The Corporation is organized exclusively for charitable and educational purposes in the public interest within the meaning of § 501(c)(3) of the Internal Revenue Code, including, but not limited to, the operation of a Florida public charter school, known as Saint Augustine Public Montessori School. Within the context of the Montessori educational philosophy, the Corporation will strive for age, sex, ethnic, racial, and socioeconomic diversity, and will seek to nurture the potential of every child to become intrinsically motivated and to love learning now and for a lifetime.

**ARTICLE V. ELECTION OF CORPORATE DIRECTORS**

The directors of the Corporation shall be elected in accordance with methods and qualifications specified in the bylaws of the Corporation. In no event, shall the number of directors be fewer than three.

**ARTICLE VI. POWERS**

The powers of the Corporation shall be provided in the bylaws of the Corporation in accordance with Chapter 617, Florida Statutes with the following limitations within the meaning of §501(c)(3) of the Internal Revenue Code, as may amended. Notwithstanding any other provision of these articles, the corporation shall not carry on any other activities not permitted to be carried on (a) by a corporation exempt from federal income tax under section 501(c)(3) of the Internal Revenue Code, or the corresponding section of any future federal tax code, or (b) by a corporation, contributions to which are

deductible under section 170(c)(2) of the Internal Revenue Code, or the corresponding section of any future federal tax code.

1. No part of the net earnings of the Corporation shall inure to the benefit of, or be distributed to its members, directors, officers or other private interests. However, the Corporation shall be authorized and empowered to pay a reasonable flat salary for services rendered by its employees and to make payments and other distributions in furtherance of the purposes set forth in Article IV.
2. Only an insubstantial amount of the activities of the Corporation shall be in furtherance of a purpose not set forth in Article IV.
3. Only an insubstantial amount of the activities of the Corporation shall be the carrying on of propaganda, or otherwise attempting to influence legislation, within the meaning of §501(c)(3) of the Internal Revenue Code, as may be amended, unless the Corporation elects the provisions of § 501(h) of the Internal Revenue Code, as may amended.
4. In no event shall the Corporation have the power to participate in, or intervene in, including the publishing or distributing of statements, any political campaign on behalf of, or in opposition to, any candidate for public office, all within the meaning of § 501(c)(3) of the Internal Revenue Code, as may be amended.
5. In the event the Corporation chooses to litigate, using its own staff attorneys on behalf of its members or other clients, the Corporation shall comply with the guidelines provided within Revenue Procedure 92-59, 1992-2 C.B. 411-12, as may be amended, superseded or modified. The bylaws of the Corporation shall adopt these provisions accordingly.

## **ARTICLE VII. MEETINGS**

- 1.) After incorporation, the appropriate members of the Corporation shall hold an organizational meeting in accordance with Chapter 617, Florida Statutes, as amended.
- 2.) The board of directors of the Corporation may participate in a regular or special meeting by, or conduct the meeting through, the use of any means of communication which allows all directors participating to simultaneously hear one another. A director participating in such a meeting is deemed present at the meeting. In the alternative, the board of directors may take actions through signed e-mail communications provided all board members agree.

## **ARTICLE VIII. INCORPORATORS**

The names and addresses of the Incorporators are: Margaret Jean McDowell, 268 Saint George Street, Saint Augustine, FL 32084, and David Lowther, 268 Saint George Street, Saint Augustine, FL 32084.

#### **ARTICLE IX. DISSOLUTION**

Upon dissolution and upon payment or adequate discharge of all liabilities and obligations, the assets of the Corporation shall be distributed for one or more exempt purposes within the meaning of § 501(c)(3) of the Internal Revenue Code, as amended, or shall be distributed to a State or the Federal government for a public purpose.

#### **ARTICLE X. REGISTERED AGENT AND OFFICE**

The Registered Agent of the Corporation is Margaret Jean McDowell and the Registered Office of the Corporation is 268 Saint George Street, Saint Augustine, FL 32084.

#### **ACCEPTANCE BY REGISTERED AGENT**

Having been appointed the Registered Agent of the Saint Augustine Montessori Community, Inc., and to accept service of process for the above stated corporation at the place designated in this certificate, I hereby accept the appointment and agree to act in this capacity. I further agree to comply with the provisions of all statutes relating to the proper and complete performance of my duties, and I am familiar with and accept the obligations of my position as registered agent.

I submit this document and affirm that the facts stated herein are true. I am aware that any false information submitted in a document to the Department of State constitutes a third degree felony as provided for in s.817.155, F.S.

Dated this \_\_\_ day of \_\_\_\_\_ 20\_\_.

By : \_\_\_\_\_

## APPENDIX

### **F. Letters of Support**

The SAMC has received many letters of support expressing confidence in the proposed charter school. These letters are presented in this appendix.

## APPENDIX

### **G. Montessori Site Evaluation**

The evaluation of facility costs for the SAPMS received from a local real estate broker is presented in the letter to the SAMC on the next page.



24 July 2011

St Augustine Montessori Community  
268 St George Street  
St Augustine FL 32084

To whom it may concern:

Thank you for the opportunity to discuss availability of suitable locations for the proposed St Augustine Public Montessori School.

There are numerous facilities currently available in the greater St Augustine area and such properties come and go from the active market on a regular basis as spaces are leased and as leases expire. Whatever property is selected, it is likely that some modification or build-out will be necessary, as school sites do not often come available.

Based on the list of general requirements you have provided and the inventory available, it is my professional opinion that you can secure the space needed for approximately \$25 - \$35 per square foot on an annual basis. This range would include the modifications and/or build-out previously mentioned. While the range is wide, I believe you could achieve the desired result somewhere close to the middle.

It is important for you to understand that under current market and economic conditions it would difficult to impossible for you to secure a lease agreement prior to the approval of the charter application.

Sincerely,

A handwritten signature in blue ink, appearing to read "Irene Arriola", is written over the word "Sincerely,".

Irene Arriola  
Broker/Associate, GRI, CDPE