

Michelle  
Wood  
7/30/2010



# West Orange Montessori

CHARTER SCHOOL

Final Charter Application

Submitted to  
Orange County Public Schools  
*Office of School Choice*

by  
West Orange Montessori Charter School Founders' Group  
August 1, 2010

*[Handwritten signature and date]*  
8/1/10



ORANGE COUNTY PUBLIC SCHOOLS  
445 WEST AMELIA STREET  
ORLANDO, FLORIDA 32801

**Charter School Application (Subject to change by the DOE)**

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

Name of Charter School: **West Orange Montessori Charter School**

Name of Non-Profit Corporation that will hold the Charter:  
**West Orange Montessori Charter School, Inc.**

Has the Corporation applied for 501-C3 Non-Profit status? **Yes**

Contact Person: **Michelle Dulany**

Title/Relationship to Non-Profit: **Executive Director - Principal**

Contact Person's Address: **227 S. Main St., Winter Garden, FL 34787**

Phone Number: **cell: 407-803-2042 407-654-0700**

Fax Number: **call before faxing: 407-654-0700**

E-Mail Address: **michelle.dulany@gmail.com**

Name of Management Company (if any) **N/A**

Name of Partner Organization (if any) **N/A**

Name/Address and contact number for Founding Board Chairperson: Thom Palmer 407-716-3020 / 407-347-7137

Grade Levels and Number of Students for proposed charter school: K- 8th Grade; Total: 345

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 revocations 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 service as the primary contact for this application on behalf of the organization.

Signature

Date

Michelle Dulany  
Printed Name

3/1/2010 updated

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### I. EDUCATIONAL PROGRAM DESIGN

#### **A. Mission Statement:**

1. Provide the mission statement for the proposed charter school.

*The mission statement should, in a few concise sentences, indicate what the school intends to do, for whom and to what degree. A school's mission statement provides the foundation for the entire application and, if approved, the full term of the school's charter. Please include grade levels and number of students to be served.*

**West Orange Montessori Charter School cultivates a joyful, authentic Montessori Education for children in Kindergarten through 8th grade, guiding each child to academic excellence, and toward their unique purpose and responsibility in our global community.**

(Total Enrollment: 345)

2. Describe how the proposed school will use the guiding principles for charter schools as established by F.S. 1002.33(2)(a) to meet the statutorily defined purpose of a charter school.

*In accordance with the law, charter schools shall be guided by the following principles:*

- *Meet high standards of student achievement while providing parents flexibility to choose among diverse educational opportunities within the state's public school system.*
- *Promote enhanced academic success and financial efficiency by aligning responsibility and accountability.*
- *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 learning for every year spent in the charter school.*

**"The role of education is to interest the child profoundly in an external activity to which he will give all his potential."**

**Dr. Maria Montessori**

*In accordance with its mission, the goal of the educational program at West Orange Montessori Charter School is to ensure that all students meet or exceed rigorous academic, personal and social objectives. This will be accomplished using a curriculum that effectively aligns the research-based Montessori K-8 curriculum with the Florida State Next Generation Sunshine Standards. Montessori's holistic, comprehensive, individualized curriculum, and integrated character education make it well suited to achieving the mission. WOMCS will provide local families with proven educational innovation by bringing a world-class Montessori education to students who have not achieved their potential through traditional education.*

West Orange Montessori Charter School will accomplish our goal of high student achievement and parent flexibility through creating and sustaining a small, dynamic, diverse school community of students, parents, educators, and community members who choose to embrace our mission of cultivating an excellent Montessori educational experience for all children. Student success at



WOMCS is the shared responsibility of the students, their parents, and their teachers. In accordance with Florida law, West Orange Montessori Charter School will be guided by the following principles.

- *Students will meet or exceed high standards of achievement using the comprehensive Montessori Elementary Curriculum aligned with Florida's Next Generation Standards.* WOMCS will use the Montessori learning materials and pedagogical approach, as well as implementing current relevant educational research to improve student learning. The Montessori method celebrates all facets of diversity, and offers well-documented, worldwide educational success with all types of learners. Ongoing student assessment is embedded in the lessons of the Montessori curriculum, and highlighted in all Montessori Teacher Training. Montessori education provides individualized, differentiated instruction leading to mastery of national and state standards, and uses best practices to develop comprehension, computation, critical thinking, character, and community service in students. Our Montessori Charter School will offer regional families the appealing choice of a tuition-free public Montessori education for their children. If approved, this K-8 charter school will currently be the only public Montessori educational choice serving local families in Orange County. The West Orange community will benefit by having a small, public Montessori school with a strong commitment to families, children and service to others. The size of our charter school will allow area families the choice of a small, safe learning environment for their children. WOMCS will provide a neighborhood-feel through its size and welcoming culture, and will promote healthy, environmentally sound values to enhance the educational experience for everyone involved. The school size will foster improved student achievement because of the school's capacity for close control over its programs and staff development, and its ability to closely monitor and support the educational change process, as well as provide strong, supportive relationships with students and families.
- *WOMCS will promote a standard of excellence and sustainable academic success while holding to, and practicing only the highest standards of fiscal responsibility.* Our first priority regarding accountability is to uphold our charter contract with our sponsor, OCPS. West Orange Montessori Charter School has retained the accounting services of CPA, George Miarecki, (see Appendix for resume) for all monthly accounting, reporting, and financial consultation. We understand and accept the enormous fiduciary responsibility we have to our students, parents, the community and our charter sponsor to use any and all resources effectively and honorably to provide area families with an excellent Montessori education. Academic and fiscal responsibility, balanced by accountability standards are essential to successfully facilitate the mission of West Orange Montessori Charter School. The Executive Director will work closely with the CPA on financial matters current and projected, frequently assessing the health of our school's budgets. Monthly Board of Directors Meetings will involve budget review and oversight.

Academically, WOMCS will use consistent and ongoing formal and informal learning assessments, providing valuable guidance for instruction and progression through the Montessori curriculum. Assessment data will provide valuable status information for continuous school-wide educational review, improvement, and overall progress in meeting the educational goals set forth in this charter. Our oversight goal, and the Board of Directors main objective is to consistently assess, in real time, both the academic and financial health of the school. WOMCS purposes to serve children well, taking responsibility for being held accountable to fully meet that obligation.

The WOMCS Board of Directors is an accomplished, strong team of parents, educators, business leaders, and community members who are committed to children, the community, and to Montessori education. They are convinced of the effectiveness of the Montessori education for improving student achievement and for developing the unique capacities and

character in each individual. The Founding Board offers the school a range of pertinent experience, including educational, financial, business and law. The Founders are committed to ensuring success of the school after start-up by assuming roles on the Governing Board of Directors, the School Advisory Committee, as consultant, or as school staff. Later in this charter we will include clear, measurable academic goals, as well as projected budgets, with a description of how progress toward these goals will be assessed. (Also included in Appendix see resumes.)

- *WOMCS will consistently encourage and actively build strong parent partnerships to best support student achievement and excellence, and to ensure our educational objectives will be met in all areas, particularly in reading.* WOMCS realizes that the community has various types of families, and acknowledges that the term parents, for the purposes of this document, include guardians. WOMCS considers all caregivers vital partners in the education of their children. Therefore parents will be welcome at school and will be given many opportunities for participating in school life. A strong, collaborative relationship between the school and parents will be further supported through multi-age, multi-year classroom structures that allow for long-term relationships with teachers. Parents, in partnership with the school, will be made aware of their child's weekly progress, and actively participate in their child's educational process, most importantly in supporting their child's reading ability. A comprehensive reading assessment using FAIR, and other assessments will take place within two weeks of the student's initial enrollment in the school. The resulting information will be shared with parents, and become a first instructional reference point. Upon enrollment, parents will contract with the school through a signed agreement, to volunteer a minimum of 30 hours per academic year, which includes participating in daily classroom sessions listening to emergent readers, helping with a classroom or school-wide projects, and chaperoning field trips. Scheduled parent-teacher conferences are included in the school calendar, with classroom teachers available if needed for after school phone conferences. Written progress reports will supplement conferences, and be issued to parents twice per academic year. The final progress report will include a grade-level assessment result, and promotion status for each child. A school-wide homework policy, also communicated with parents upon enrollment at WOMCS, centers on daily reading practice for the student. Recommendations are 15 minutes per day of the student reading aloud to a parent for Kindergarten students; 20 minutes reading aloud for 1st-3rd grade students, 30 minutes of silent reading for 4th-6th grade, and 40 minutes silent reading at home for 7th-8th. Parents are encouraged to read aloud to their children every day as part of their parental commitment to academic excellence for their children. WOMCS will use FAIR to assess reading gains throughout the academic year for K-3. A baseline assessment, using SAT10 or similar will be established for 1-8 grade during the Fall each academic year. Based upon this information, and previous academic records, Personal Educational Plans will be designed for each child every school year, that will inform their academic career at the school.

*Implementing the research-based Montessori Language/Reading Program, supported by the Guided Reading program recommendations, methods, and principles of Fountas & Pinnell, will produce significant, measurable reading achievement for all children. Reading will be a major focus of our K-8 curriculum.* The ability to read opens up the world to a child, and therefore one of our most important educational goals is that every student reads confidently and successfully for both pleasure and independent research. West Orange Montessori Charter School seeks to be known, and well regarded through Orange County for our strong, successful reading program.

Our intent is to focus and clearly articulate our school's mission to ensure that those individuals who choose to come to West Orange Montessori Charter School to work and to learn, come with both purpose and commitment.

3. Describe how the school will meet the Prescribed Purposes for charter schools found in F.S. 1002.33(2)(b).

*In accordance with the law, charter schools shall fulfill the following purposes:*

- *Improve student learning and academic achievement.*
- *Increase learning opportunities for all students, with a special emphasis on low-performing students and reading.*
- *Encourage the use of innovative learning methods.*
- *Require the measurement of learning outcomes.*

**"If education is always to be perceived along the same antiquated lines of a mere transmission of knowledge, there is little to be gained from it in the bettering of man's future."**

**-Dr. Maria Montessori**

*West Orange Montessori Charter School will fulfill the prescribed purposes for charter schools found in F.S. 1002.33(2)(b) through establishing and operating an excellent Montessori K-8 Public School Program. Over one hundred years old, and found in almost every country worldwide, the scientifically-based Montessori program is well positioned to improve student learning and academic achievement across socio-economic, cultural, and learning challenge barriers by offering the young child a developmentally appropriate learning environment with a meaningful, hands-on curriculum with which to build their intellect. Montessori also offers the child a specially trained guide, or teacher, who understands his development, and respects his innate motivation to learn. Dr. Maria Montessori originally designed her educational method to support low-performing students, and the result was inspiring and historical. Approaching her study of children as a scientist would, Montessori spent years observing the child, specifically how he constructs his unique personality. The resulting Montessori method is by nature, a scientifically researched educational method based upon observation and documentation. Dr. Montessori always said she didn't discover a method, she discovered the child, and created an educational environment to best support his quest to build his intellect and personality. Like all true Montessori programs, we will offer differentiated instruction for every child, which is proven successful with every learner. The Montessori method has always been differentiated education. Montessori is progressive and constructivist in theory; an innovative hands-on learning approach, with its distinctive didactic classroom materials, specialized teacher training, and unique scope and sequence predicated on grand, absorbing narratives. Montessori is both child and lesson-driven, allowing for a blend of order and free choice, giving the child structured routines but the freedom to decide what routine to enact when. Promising recent educational research suggests this combination may be most optimal. The statute states that a charter school should, "increase learning opportunities for all students, with special emphasis on low-performing students and reading." The Montessori Educational Program was designed for this very purpose and successfully meets this requirement. Many ESE Accommodation recommendations follow a similar method to Montessori pedagogy in ensuring that children understand the big picture of a lesson as a starting point. This charter application provides greater detail addressing both low-performing students, and the great emphasis of reading in Montessori, as well as curriculum specifics of the Montessori reading program. WOMCS will measure learning achievement outcomes using FCAT, and on-going informal assessments, as well as establishing baseline data using SAT10 and FAIR for reading during the fall of each year.*

WOMCS defines a joyful, authentic public Montessori education to include the following elements.

- *Beautifully and thoughtfully prepared classrooms, designed with a complete collection of developmentally appropriate Montessori learning materials.* A clean, well-organized, and aesthetically pleasing learning environment promotes concentration and supports learning for every child. Research shows that children need well-organized physical environments to support cognitive development, and Montessori classrooms provide children with this environment. Montessori prepared classrooms are designed to encourage exploration. Classrooms will be arranged in subject- study centers, with clusters of student-sized tables, chairs, and open floor space instead of individual desks. Each study area will be surrounded by shelves of Montessori learning materials and books pertaining to a particular subject, Language Arts, Math, History, Geography, and so on. Students are encouraged to move about the classroom, choosing resources as they pursue their work plan. Students exercise the option to work alone or in small groups.
- *Research-based, world-renown Montessori Materials.* Scientifically designed manipulative learning materials are at the heart of a Montessori classroom. The materials are self-correcting and provide the student with feedback, thus reinforcing autonomy, confidence, and self-motivation. Every piece of learning apparatus has a specific purpose, and focuses on a particular skill or concept, while at the same time addressing many levels of comprehension from concrete to abstraction. In Montessori elementary, extensive written materials in each subject support the Montessori emphasis on the individual's own research from reference books, primary and secondary sources, like the internet, rather than compilations of information in textbooks. From their own research the children synthesis their new knowledge and create books or projects illustrating their understanding.
- *Multi-age classrooms consisting of 1<sup>st</sup> thru 3<sup>rd</sup> graders, and 4<sup>th</sup> thru 6<sup>th</sup> graders, more commonly called: Lower EL (6-9), and Upper EL (9-12), as well as a 7<sup>th</sup>-8<sup>th</sup> Middle School Classroom.* Multi-age classrooms provide children and teachers with the benefit of a three-year relationship, greatly enhancing individualization and assessment. Students are placed in mixed age classes for three-year groupings in elementary. The first grouping is 1<sup>st</sup> through 3<sup>rd</sup> graders, referred to as the (6-9) Lower EL, or EL-1. The second grouping includes 4<sup>th</sup> through 6<sup>th</sup> graders and is called (9-12) Upper EL, or EL-2. The Middle School will be up to two combined 7<sup>th</sup> and 8<sup>th</sup> grade classrooms. In total, WOMCS will offer two Lower EL, two Upper EL and two MS multi-age classrooms. As documented in various writings by Lilian Katz, these mixed age classrooms provide numerous benefits including a greater range of curriculum options, addressing above and below average students needs, and an absence of competition between students. Older children teach younger children which builds confidence and competence. Peer tutoring in the multi-age group promotes a classroom culture of cooperation and collaboration.
- *Quality teachers who are both Montessori and State of Florida certified, possessing a passion for seeing each child flourish, and strongly committed to the school's mission.* To attract the best teachers WOMCS will offer the Florida Retirement Program as a public employer, as well as competitive compensation. Low teacher-student ratios provide teachers with more instructional time for each child. Classroom Teacher/Student ratios: (K) 1:18, (1<sup>st</sup>-3<sup>rd</sup>) 1:18, (4<sup>th</sup>-6<sup>th</sup>) 1:18, and (7<sup>th</sup>-8<sup>th</sup>) 1:22. Two to three teachers and/or an intern/assistant will be assigned to each class configuration. Teachers will be given time daily and weekly to plan and discuss curriculum and assessment with an ongoing focus on accountability for

student success. Teachers will rarely be the center of attention in the classroom. Instead the teacher is one source of information among many. This departure from the traditional teacher-led format, combined with school-wide low teacher/student ratio, frees the teacher to spend time giving small group lessons, observing, making notes on student progression and guiding individual students through curriculum. Administrators, Teachers, and all staff will model appropriate, respectful, caring behavior and constructive conflict resolution.

- *Individualized education founded upon differentiated instruction using child and lesson-driven Montessori Personal Education Plans.* Montessori curriculum correlated with Florida's Next Generation Standards K-8th will be used. Differentiated instruction, integral to individualized learning and essential in Montessori education, has been shown to increase student success and satisfaction in school (ERIC ED443572- S.A. Tomlinson, 2000). Students will work according to their individual weekly work plans, that they develop with their teachers based on their PEP. These work plans, or contracts, set forth how the student will complete curriculum requirements. All student work will be monitored daily and weekly by teachers, to ensure that PEP goals are met. In addition, teachers will meet with the Director/Curriculum Coordinator, and or parents to update, and if necessary modify a student's PEP to support adequate progress meeting academic benchmarks.
- *Frequent observations and assessment of student learning outcomes throughout the year, faculty collaboration, and active parent partnership and participation will provide the momentum for our Montessori K-8 program.* Teachers will facilitate learning by carefully observing and documenting each student's growth, behavior and academic progression, then guiding the child using changes in lessons and materials, invitations for inquiry, and differentiated instruction. Teachers will work to create and sustain a classroom and school culture where demonstrations of respect, initiative, risk-taking and motivation in learning are the joyful norm.
- *Individual and small group lessons with immediate, ongoing assessment embedded in every lesson ensuring mastery of content across the Montessori curriculum for every child.* An example of this may be seen in Guided Reading lessons, where 2 to 5 children are grouped together according to ability. Montessori lessons are designed for either small groups of children or individuals. Students will go beyond rote memorization and repetition, to true understanding, evaluation and synthesis of knowledge. The individual student will progress at her own rate, either moving ahead without having to wait for the rest of the group, or taking the extra time she may need to successfully internalize the lesson and material.
- *Joyful, self-directed, exploratory learning leading to personal responsibility and intrinsic motivation in students.* Perceived choice in learning has been shown to enhance motivation to achieve (A. Lillard). Children also begin the process of discovering who they are, what their unique strengths are, and how they personally fit into the evolving story of humanity. Self-directed learning with the guidance of a trained teacher to provide oversight enables the child to experience a strong sense of control and ownership over what he has learned. Exploratory learning facilitates a non-competitive, respectful, inclusive school-wide culture, which integrates a diversity of children and abilities, and supports the development of intrinsic motivation and self-discipline within the child.
- *Long, uninterrupted work cycles and project-based learning that encourage concentration and focus in children.* The weekly organization of learning time will be based on an established

Montessori tenet, that it is essential for children to have long, uninterrupted daily work periods (2.5 - 3 hours at a time) each school day. Therefore, the morning will be dedicated to this core subject work time: Reading, Writing and Math, then lunch, outdoor play, silent reading, Specials such as Spanish, Art, Music, and PE are scheduled in the afternoon. Whole class instruction will be as needed and minimal, usually limited to the beginning and end of the day. The school day will be structured to allow students to spend long blocks of time on work that they choose within the framework of their PEP. This enables students to explore a topic or material thoroughly, and to carry it to completion.

- *An emphasis on stewardship and respect for the natural world, with a global awareness and appreciation for the interconnectedness of all of life.* Creating a lasting and profound understanding and respect for all cultures and living beings through an interdisciplinary, developmentally appropriate, and respectful teaching and learning philosophy. West Orange Montessori Charter School will take advantage of the vast resources available in the Central Florida area. Students will create and use our partnership with the community as both a source of knowledge and as a means of applying what they learn to give back. Educational Partnerships, such as one with Oakland Nature Preserve will directly connect children to nature and biology enriching the learning experience for the school community. Children will learn to give back through service to our community, and to support our natural environment and local communities. This commitment to community is a logical extension of the values of the Montessori philosophy.

4. Describe how the charter school will fulfill, if applicable, the Optional Purposes of charter schools found in s. 1002.33(2)(c).

*In accordance with the law, charter schools may fulfill the following optional purposes:*

- *Create innovative measurement tools.*
- *Provide rigorous competition within the public school district to stimulate continual improvement in all public schools.*
- *Expand the capacity of the public school system.*
- *Mitigate the education impact created by the development of new residential dwelling units*
- *Create new professional opportunities for teachers, including ownership of the learning program at the school site.*

**"The child is truly a miraculous being, and this should be felt deeply by the educator."**

**By Dr. Maria Montessori**

- *A team of Montessori educators will work to create innovative Montessori-based Assessment Tools, Assessment Handbooks, and Benchmark Portfolio Entries for use in Grades K-8.* When teachers pursue Montessori certification, they carefully document and sequence comprehensive lessons for each of the core curriculum subjects within a series of Teaching Albums. Our own professional experience and preliminary review has confirmed that the Montessori lessons target most, if not all the core learning objectives of the Next Generation Standards. During the planning year a team of Montessori educators will identify curriculum areas in that may need further development within the Montessori Curriculum. Development of these areas will be supported through focused professional development

and collaborative study among the professional staff during the first several years of the school. During the first 3 years, including the planning year, a team of educators will work to create Montessori Grade K-8 Assessment Handbooks cross-referenced with the Next Generation Standards for Reading, Writing, Mathematics, and Science. Benchmark Portfolio Entries for Lower Elementary 1-3 grade, Upper Elementary 4-6, and 7-8th grade will be drafted to articulate criteria for acceptable demonstrations of learning for the school's Academic, Personal, and Social Achievement Objectives. To represent this Portfolio, during the first academic years teachers will diligently collect samples of student work illustrating levels of competence for Benchmark entries. Lastly, the faculty will work with students and parents to build understanding and commitment to the Benchmark Portfolios since the first year's second graders will be the first group working to achieve the Benchmark Expectations. The Benchmark Portfolios will serve as the demonstration of promotion standards from 3<sup>rd</sup>, 6<sup>th</sup> and 8<sup>th</sup> grades. Core Classroom-based assessment practices and tools will be clearly defined for Reading, Writing, Math, and Science. Our goal as a Montessori Charter School is to help improve our community's public educational system, and to improve individual student achievement. Creating Montessori Elementary and Middle School Assessment tools and handbooks will greatly enhance opportunities for future Montessori Charter Schools to launch, operate and replicate efficiently and successfully.

- *We expect that the existence of a small, Montessori charter school will stimulate positive, healthy competition within neighboring public schools, and highlight the many educational benefits that Montessori education provides.* By offering parents greater school choice we hope to encourage other public schools to explore Montessori-inspired principles and methods within their classrooms and school-wide. WOMCS seeks to be a school of excellence that can be a model for future public Montessori Charter Schools. A Montessori school of choice in the area provides a sense of competition within the educational system, as schools vie for student enrollment. We envision future cooperation between different kinds of schools, and possibly future shared professional development workshops. Most genuine educators share a vision to guide children successfully, by using our different approaches with a common desire to share what is working and what is not, with our colleagues, perhaps we can begin to serve children more effectively. We hope our presence in the educational community inspires a healthy competition within OCPS system, rather than one of animosity. We need to open opportunities to pool our skills and resources as professional educators on what we do successfully to help all children learn. Parents will enroll their children in schools that meet their child's needs appropriately.
- *West Orange Montessori Charter School will expand the capacity of the public school system by offering families an innovative K-8 education typically found only in tuition-based private schools.* We seek to establish high quality Montessori education as a public school choice, and therefore accessible to more families in our geographic area, reinvigorating our local public school system. WOMCS will provide some enrollment relief to Tildenville Elementary, Dillard Street Elementary, and Whispering Oaks Elementary. By offering greater school choice we may ease overcrowding in these neighboring schools.

WOMCS seeks to be a safe, welcoming, community-centered Montessori school where children who struggle in other types of learning environments may thrive in our alternative one. Children and their learning needs are uniquely different, and we believe public schools should reflect that fact as well.

- *The Winter Garden, Ocoee, Apopka, Windermere, and Oakland areas are growing at a rate that our charter school will provide new and existing families with the option of an innovative, quality public K-8 school to choose.* Our maximum enrollment of 345 students, many from the new neighboring developments, should help ease some public school overcrowding. New home developments, such as neighboring Oakland Park will have a small, neighborhood public school for its new residents. The two closest charter programs to our proposed location consistently have long waiting lists, which is a strong demographic indicator that schools of choice are popular with families in this West Orange area.
- *WOMCS seeks to create a culture of strong teacher professionalism, creativity, ownership and leadership, through cooperative team teaching and collaborative program building, implementation and continuous evaluation.* Excellent Teachers form an integral part of our school-building team, and in the ongoing process of the school's evolution and shared achievement. WOMCS will prioritize hiring only the best, well-educated, passionate and energetic teachers to work with us in fulfilling the Montessori mission of the school. Teachers will work collaboratively to create original Montessori Elementary Assessment tools, handbooks, and benchmark portfolio entries for use school-wide. Teachers enthusiastically participate in all program planning and implementation, as well as designing professional development opportunities based upon their own professional goals. Teachers work together to thoughtfully mentor intern and new teachers. Teachers will communicate together as a team daily and weekly on Wednesday afternoons, with the purpose of increasing student achievement. Teacher participation in program design, implementation, evaluation, and supervision will encourage and maintain a sense of school ownership and dedication to our purpose and mission. We seek an atmosphere of instructional partnership and shared commitment to student achievement. WOMCS intends to support the unique professional development needs of its teachers, providing a venue for continual professional growth and accomplishment, and providing a respectful place for teachers to continue to learn and develop as educators. West Orange Montessori Charter is the shared creation and responsibility of the educators, parents and community partners involved.

## B. Target Population and Student Body

### 1. Describe the anticipated target population to be served.

*If applicable, applicants should describe if they will target, in accordance with law, certain populations defined in section 1002.33 (10 (e), F.S.*

**“Free the child's potential, and you will transform him into the world.”**

**Dr. Montessori**

*West Orange Montessori Charter School seeks to serve families in our local community who are interested in a proven, hands-on learning approach for their K-8 aged children.* WOMCS does not discriminate against, and is nonsectarian in its programs, admission policies, employment practices and operation. The school will enroll any eligible student who submits a timely application, unless the school receives a greater number of applications than there are spaces for students, in which case students will be admitted through a random selection process called a lottery. We seek to bring a world-class Montessori educational experience to those children for whom traditional education is not benefiting. WOMCS will adhere to the antidiscrimination provisions of s. 1000.05.



In order to help explain our educational method to the community and families who may never have heard of Montessori, we will hold regular "What is Montessori?" informational sessions at the public library and other venues. These informational sessions will commence upon charter approval notification. Informational Sessions will eventually be moved to the new school property, where we will provide actual small group and individual tours of the Montessori classrooms for prospective families. Montessori education is most beneficial for children when families are committed to the full K-8 educational program. We will offer regular Parent Education Events to help educate and involve parents, leading to improved educational commitment to Montessori education and to the school. In order to establish an excellent, healthy Montessori program according to our mission, we will follow an enrollment growth plan that "front loads" Kindergarten, First, and Second Grades; then sequentially adding a grade level as children develop and are promoted through the grades, and offering new student enrollment at each grade level. Please refer to Enrollment Projections for full plan. WOMCS is an equal access school governed by all applicable laws as stated in the Florida Charter Statutes.

#### Non-discriminatory Policy

West Orange Montessori Charter School is a Florida Charter School that admits students of any race, color, national or ethnic origin and honors all the rights, privileges, programs and activities generally accorded or made available to students at the school. It does not discriminate on the basis of race, color, national or ethnic origin in administration of its educational policies, admissions policies, athletic and other school administered programs.

Under 1002.33(10)(e)5, which says, "*A charter school may limit the enrollment process only to target the following student populations-* Students who meet reasonable academic, artistic, or other eligibility standards established by the charter school and included in the charter school application and charter or, in the case of existing charter schools, standards that are consistent with the school's mission and purpose. Such standards shall be in accordance with current state law and practice in public schools and may not discriminate against otherwise qualified individuals."

**Please Note: Returning Students will not be required to re-apply each academic year.**

1. WOMCS may choose to give enrollment preference to eligible students with previous Montessori school experience, preschool and or elementary, in fulfillment of our Montessori school mission, however this is not a requirement for enrollment.
2. Students residing in Orange County, and who submit a timely application, unless number of applications exceeds the capacity of our program, class, grade level, or facility. In such cases, all applicants shall have an equal chance of being admitted through the random selection process of a lottery.
3. Students who are siblings of a student enrolled in WOMCS.
4. Students who are the children of a member of the governing board, or an employee of WOMCS.

*WOMCS will provide transportation to and from the school for students who live between 2 and 5 miles away from the school. WOMCS will work with OCPS Department of Transportation using the allotted one bus to transport students within 2-5 miles of the school. Car-pooling for those interested families will be arranged by a designated parent coordinator each Fall. Our goal is to make Montessori education accessible to more families who reside within a reasonable distance from the school. As an equal access educational program, West Orange Montessori Charter School seeks to insure that transportation is not a barrier to enrollment. As our school grows we will continue to evaluate all of our transportation options in light of school budget considerations.*

2. Provide the following for each year of proposed operation: the grades that the school will serve, the number of students to be served in each grade, the number of students expected in each class, and the total number of students enrolled.

**West Orange Montessori Charter School Enrollment Projections, Years 1-8**  
June 2, 2010

Class size requirements:

*\*If more than one teacher is responsible for all of the students in a classroom, the total number of students in the classroom is divided by the number of teachers assigned to these students to determine class size. (Taken from [www.fldoe.org](http://www.fldoe.org) Class Size, Q&A)*

**Year 1 – 2 Lower EL (1-3 Grade) Classes**

Kindergarten-18  
18:1 -Teacher

Lower EL (6-9)

Grade 1- 18

Grade 2- 18

Grade 3- 0

36-Students

2- Teachers /1 Assistant

Lower EL (6-)

Grade 1- 18

Grade 2- 18

Grade 3- 0

36- Students

2- Teachers / 1 Assistant

**90 Students- Year 1 – 5 Teachers + 2 Assistants**

**Year 2 – 2 Lower EL Classes-Add: 3<sup>rd</sup> Grade**

K- 18  
18:1

Lower EL (6-9)

Grade 1- 18 (9+9 new)

Grade 2- 18

Grade 3- 18

54

3-Teachers + 1

Lower EL (6-9)

Grade 1- 18 (9+9 new)

Grade 2- 18

Grade 3- 18

54

3- Teachers + 1

**126 Students- Year 2 – 7 Teachers + 2 Assistant**

**Year 3 \* - 2 Lower EL Classes-Add: 2 Upper EL (4-6<sup>th</sup> Grade) Classes-4<sup>th</sup> Grade**

K- 18  
18:1

Lower EL (6-9)

Grade 1- 18 (9+9 new)

Grade 2- 18

Grade 3- 18

54: 3/1

Lower EL (6-9)

Grade 1- 18 (9+9 new)

Grade 2- 18

Grade 3- 18

54: 3/1

Upper EL (9-12)

Grade 4- 18

Grade 5- 0

Grade 6- 0

18: 1-Teacher (1 shared Assistant)

Upper EL (9-12)

Grade 4- 18

Grade 5- 0

Grade 6- 0

18: 1-Teacher

108  
+18 K  
+36 -4<sup>th</sup> Graders

**162 Students- Year 3 – 9-Teachers + 3 Assistants**

**Year 7 – 2 Lower EL Classes; 2 Upper EL; 2 Middle (7<sup>th</sup> & 8<sup>th</sup>)**

K-18  
18: 1

Lower EL- 54  
54: 3/1

Lower EL- 54  
54: 3/1

Upper EL- 54  
54: 3/1

Upper EL- 54  
54: 3/1

Middle Grades -2  
Grade 7 - 22  
Grade 8 – 22 = 44: 2/1

**322 Students- Year 7 – 17 Teachers + 6 Assistants**

**Maximum WOMCS Student Enrollment: 345**  
(23 Student spaces reserved)

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**WOMCS Enrollment Summary:**

**2 Classrooms- Lower EL (6-9)**

1<sup>st</sup> Grade- 18 students

2<sup>nd</sup> Grade-18 students

3<sup>rd</sup> Grade-18 students = *combined- 54 students in each Lower EL (6-9) Classroom; 3 Teachers & Assistant*

**2-Classrooms- Upper EL (9-12)**

4<sup>th</sup> Grade- 18 students

5<sup>th</sup> Grade- 18 students

6<sup>th</sup> Grade- 18 students= *combined- 54 students in each Upper EL (9-12) Classroom; 3 Teachers & Assistant*

**2-Classrooms- Middle School (12-15)**

7<sup>th</sup> Grade- 22 students: 1 Teacher

8<sup>th</sup> Grade- 22 students: 1 Teacher= *combined 44 students in each Middle Classroom; 2 Teachers & Assistant*

# West Orange Montessori Charter School

## Elementary K, (6-9) and (9-12) Daily Student Schedule

Day/Time	Monday	Tuesday	Wednesday	Thursday	Friday
8:05 – 8:30	Student Arrival				
8:30 – 9:00	Classroom Morning Meeting				
9:00 – 12:00	Montessori Work Time: Core Academic Subjects Reading, Math, Writing, Science				
12:00 – 12:45	Lunch/Recess LE Special UE	Lunch/Recess LE Special UE	Lunch/Recess LE Special UE	Lunch/Recess LE Special UE	Lunch/Recess LE Special UE
12:45 – 1:30	Lunch/Recess UE Special LE	Lunch/Recess UE Special LE	Lunch/Recess UE Special LE	Lunch/Recess UE Special LE	Lunch/Recess UE Special LE
1:30 – 2:15	Work time Special	Work time Special	Student Early Dismissal	Work time Special	Work time Special
2:15 – 3:00	Work time Special	Work time Special	Teacher Planning & Weekly Faculty Meeting 2:00-4:00	Work time Special	Work time Special
2:55 – 3:15	Chores and Dismissal				
3:30 -5:00pm	Possible Extended Day and / or Extra Curricular Activities				

WOMCS Policies on Absences & Tardiness:

1. If a student does not enter the school building by 8:30am, THE PARENT MUST SIGN IN at the front desk.
2. It is also very important to send in a written note excusing any absences.
3. Too many late arrivals or absences will require a conference with the Executive Director and the implementation of a plan of action to correct the situation. A habit of late arrivals and absences could result in the student being asked to return to the appropriate district school.

*WOMCS is responsible to see that all students arrive on time, and that absences are kept to a minimum. Florida's mandatory attendance laws require this. Our goal is to meet 90% attendance. Please assist our efforts by making sure your child arrives on time, that you sign your child in, and that you send in a written note to excuse any absence.*

# West Orange Montessori Charter School

## A Middle School Daily Schedule

	<u>Monday</u>	<u>Tuesday</u>	<u>Wednesday</u>	<u>Thursday</u>	<u>Friday</u>
<b>8:30-8:45am</b>	----- Community Meeting (M-Th) -----		----- Class Council Mtg. -----		
<b>8:45-11:30am</b> (3 Morning Classes)	Math Literature & Writers Workshops Spanish	Math Literature & Writers Workshops Spanish	Math The Arts/Music Health/Fitness Book Groups	Math Literature & Writers Workshops Spanish	Math Science/History Socratic Seminar
<b>11:30-12:30pm</b>	Lunch/Recess Reading	Lunch/Recess Reading	Lunch/Recess Reading	Lunch/Recess Reading	Lunch/Recess Reading
<b>12:45-3:00pm</b> 1 extended class block	Science or History/ Humanities	Science or History/ Humanities  2:00-2:15	The Arts/Music Health & Fitness (Wed. Early Dismissal)	Science or History/ Humanities	Economies & Community Work
<b>3:00-3:15pm</b>	Cleaning/Dismissal	Cleaning/Dismissal	Cleaning/Dismissal	Cleaning/Dismissal	Cleaning/Dismissal
<b>3:30-5:00pm</b>	To Be Developed: Afterschool Studios				

2. Describe the proposed charter school's educational program and/or curriculum approach, emphasizing the innovative instructional methods or approaches to be used.

*As required by F.S. 1002.33, the application must illustrate how students will be provided services to attain the Sunshine State Standards.*

*For schools that intend to serve middle school students, please address how students will be offered additional opportunities to make-up courses needed in order to progress to the 9<sup>th</sup> grade, if necessary.*

**“One of the most urgent endeavors to be undertaken on behalf of the reconstruction of society is the reconstruction of education. It must be brought about by giving children the environment that is adapted to their nature.”**

**-Maria Montessori**

*Most educators and parents are familiar with, or have heard about the Montessori method of education for very young children. Montessori is a hands-on, developmentally appropriate educational program that works consistently well with all types of learners worldwide, and can continue through high school.* In the last decades before her death in 1952, Dr. Montessori developed the pedagogy, materials and curriculum scope and sequence to establish her innovative elementary and middle school educational programs. The goal of the Montessori approach is always to help children. West Orange Montessori Charter School will implement the Montessori Educational Program for K-8 students. We will purchase from “Montessori Made Manageable”, the Montessori elementary curriculum learning objectives, which are professionally aligned and correlated with Florida’s Next Generation Standards. This correlation will serve as sequential lesson plans for classroom teachers, as well as school-wide curriculum goals and objectives, providing teachers and students with the services necessary to attain the Next Generation Standards, and to demonstrate high achievement on FCATs.

*Large, Multi-age classrooms are essential to the success of Montessori programs:*

Preschool: Ages 3-6+

Elementary I: Ages 6-9

Elementary II: Ages 9-12

Middle School: 12-15

Three-year cohorts enhance the Montessori dynamic by reducing competition, maximizing curriculum options available to any one child, providing a family atmosphere that plays a vital role in socialization, and permitting older children to model advanced work for younger children. **Because one set of materials suffices for three grades, multi-aged cohorts are cost effective for schools.**

Maria Montessori described the elementary age child as very different, developmentally from the 3-6 year old. In her view, successive levels of education must correspond to the successive stages of the development of the child. Thus the educational approach for students between the ages of 6 and 12, and 12 to 15 is not a direct continuation of what has gone before, although it is built upon the foundation laid in early childhood. (American Montessori Society, 2009)

**Dr. Montessori reminds educators of three important developmental tendencies emerging in the child at the elementary school age:**

1. **The transition of the child’s mind from concrete to abstract reasoning.**
2. **The birth of a moral sense.**
3. **The intensification of the drive to explore the natural and social environment.**

**The child at this elementary stage of development shows a growing capacity for tackling problems, for reasoning, socializing, and harnessing the imagination. The Montessori elementary program is designed to meet the developmental needs of each individual child in a way that is both faithful to Dr. Montessori’s insights and consistent with the expectations of parents at the beginning of the 21<sup>st</sup> century.**



In her recent research on Montessori education, published in Science Magazine, Angeline Lillard states, "As has been too rarely noted in public discourse, the models that form the backbone of our traditional educational system are not well adapted to children. Although some children manage to excel in the system regardless, the common cultural attitude is that school is painful and not particularly fun. This should suggest to us that something is very wrong. Learning can be an engaging, inspiring activity, so schooling could be looked on with joy. The mismatch between models underlying our traditional system of education and the nature of children is at the root of the problem...Our cultural models of what a school should be and how children learn have a poor fit. Children do not thrive in a factory, where they are all treated alike, and ushered passively from one lesson to the next. Nor do they learn well when treated as empty vessels to be filled with knowledge. "As progressive educators from Dewey on have realized, and as psychological research in the past 50 years has made abundantly clear, **children actively construct their knowledge.**" (Lillard, p.325)

*Montessori elementary and middle school studies are based on a rich cultural curriculum, which integrates history, geography, mathematics, science, biology, language, literature, art and music.* This interdisciplinary approach helps children build creative and critical thinking skills, independence and responsibility, problem solving abilities, interdisciplinary breadth and competency in basic skills. Children attending WOMCS may take Florida Virtual School courses, as needed to fulfill necessary promotion requirements to 9<sup>th</sup> grade. In the following passages we will explain more fully the Montessori K-8 philosophy and innovative instructional program.

**"If the idea of the universe is presented to the child in the right way, it will do more for him than just arouse his interest, for it will create in him admiration and wonder, a feeling loftier than any interest and more satisfying. But if neglected during this 6-12 year old period, or frustrated in its vital needs, the mind of the child becomes artificially dulled, and henceforth will resist imparted knowledge. Interest will no longer be present if the seeds of learning are sown too late, but at 6-7 years, children receive all items of culture enthusiastically. As the child grows older, these seeds will expand and grow. How many seeds should we sow? My answer is: As many as possible!" – Dr. Maria Montessori**

Dr. Montessori advocated presenting the whole universe to the child in the elementary years. The universe, in all of its grandeur, holds within it the answers to all of life's questions and provides the basis for detailed subject area study. She called this "Cosmic Education", and it provides the foundation for the Montessori Elementary Curriculum. Montessori proved that by inspiring children with the "Great Lessons," such as the History of Numbers, and the Story of Writing, that children are naturally motivated to research, happily searching for answers to questions these great stories inspire. For example in the Story of Writing, the children learn why writing was invented through the study of ancient civilizations and their economies; they then discover how the development of ancient alphabets, such as the Phoenician and Greek effected the subsequent development of our modern alphabets and languages. The children learn about Greek and Latin root words, and experiencing the ancient writing process by actively participating in projects like shaping clay tablets to write letters with a stylus, or making paper. Children gain an understanding and deep appreciation for alphabets and written language. Children also develop an appreciation for the enormous contributions made by people who lived long ago.

The Great Lessons, which introduce all subjects and provide the big picture, reveal how the sciences, art, history, language, geography and mathematics are interrelated. From that point, students are introduced to increasing levels of detail and complexity within these broad areas. When you visit an elementary classroom you may see a small group of children working together to carefully recreate an intricate timeline to support their biology lessons; children acting out grammar parts of speech such as verbs, others diagramming sentences using grammar symbol stencils and colored pencils; a child may be making a book of polygons, labeling each; you may see a child multiplying decimals, or fractions, using hands-on materials and recording their work in a notebook. You will see a small group of children, each quietly reading a chapter book of their own in the classroom book-nook. It is a classroom that hums with industry and is well orchestrated, energetic, and focused. Montessori "believed that the child of six to twelve years of age could be properly educated only in the context of the whole of reality." The

child's great ability to imagine, coupled with their new ability to abstract creates the perfect educational opportunity to give them the universe. Montessori teaches from the whole to the specific, from general to detailed knowledge.

### **The Montessori Elementary Curriculum- Great Lessons: *Revisited annually in greater depth***

- **The Story of the Universe:** Describes how minerals and chemicals formed the elements; how matter transforms to three states of solid, liquid, and gas; how particles joined together and formed the earth; how heavier particles sank to the earth's core and volcanoes erupted; how mountains were formed and the atmosphere condensed into rain, creating oceans, lakes, and rivers. From this story, students are introduced to lessons in physics, astronomy, geology, and chemistry. For example they learn about light, heat, convection currents, gravity, galaxies, planetary systems, the earth's crust, volcanoes, erosion, climate, and physical geography.
- **The Coming of Life:** Explains how single-cell and multi-cell forms of life became embedded in the bottom of the sea and formed fossils. Anaerobic and aerobic respiration is examined in this early hostile environment. It traces the Paleozoic, Mesozoic, and the Cenozoic periods, beginning with the kingdom of trilobites and ending with human beings. The teacher indicates on a timeline where vertebrates began, followed by fish and plants, amphibians, reptiles, birds and mammals. This lesson is the basis for lessons in chemistry, nutrition, categories of animals and plants, care and requirements of different animals, and their interrelationship with an ecological system. Students are introduced to formal scientific nomenclature of zoology, botany and anthropology.
- **The Story of Humans:** Introduces human beings and their unique endowments of intellect and will. The aim is for the children to imagine what life was like for early humans. This lesson is the basis for lessons in prehistory and the emergence of ancient civilizations. Students are introduced to an analytical tool to compare cultures. They learn how climate and topography influence culture and political geography.
- **The Story of Language:** Describes the origin, structure, and types of writing and speaking. It begins with a discussion of prehistoric writings and drawings, and then the Egyptians, who had two kinds of symbols, one for ideas and one for sounds. The story progresses to describe the Phoenicians, who used the Egyptian's sound pictures but not their idea pictures. Next, it describes contributions of the Hebrews, Greeks, and Romans. From this lesson, students use grammar materials, which help them examine how language is put together, and refine composition, capitalization and punctuation skills. Students are introduced to the study of the origin of English words from other languages, such as Greek and Latin roots, the meanings of prefixes and suffixes, and different forms of writing, such as poetry, narrative, and plays.
- **The Story of Numbers:** Emphasizes how human beings needed a language for their inventions to convey measurement and how things are made. The story describes how the Sumerians and Babylonians had a number system based on 60, which is the reason for our 60-second minute and sixty-minute hour. Greek, Roman and Chinese numbers are introduced. The story describes how our Arabic numerals are similar to numbers found in a cave in India dated over 2,000 years ago. These Indian numerals had something that no other number system had, the zero. This story is the basis for the children's learning of mathematics, which is integrated into all studies. For example, large numbers are needed in measuring time and space in astronomy; negative numbers are needed when measuring temperature changes; and triangulation was needed to reestablish property boundaries after the Nile flooded ancient Egypt.

These “Great Lessons” also motivate the elementary child to ask, “Who am I?” “Where do I come from?” and “Why am I here?” The child who actively constructs his intellectual “scaffolding” sparked by the Great Lessons, begins to understand the big picture and to search for his own unique place in life. He discovers and builds an understanding of the myriad relationships and contributions that have formed throughout time and history to shape our world and the story of humans. They also begin to understand that they too have an important part to play in this continuous unfolding human story. This experience deeply affects him and intrinsically motivates him to work productively in the classroom. Children in a Montessori elementary are therefore equipped to mentally organize the vast array of detailed information that will comprise their future learning. It is helpful to think of the “Great Lessons” as the cultural core: the integrating element in the Montessori elementary curriculum, especially through biology, history, and chemistry. The Great Lessons give children the “Big Picture,” after which closer study establishes the details.

**“Here then is an essential principal of education: to teach details is to bring confusion; to establish the relationship between things is to bring knowledge.” – Dr. Maria Montessori**

*In addition to the integrated cultural-core Montessori lessons, children receive differential instruction for reading, writing, and mathematics, mastery in each is crucial to our mission of academic excellence for all students.* Montessori invented differentiated instruction and individualized learning decades ago. An example is the reading program in Montessori. Our Montessori reading program supports “explicit, systematic, differentiated instruction and effective, coordinated practice”. The research-based Montessori core instructional reading program includes every aspect of reading: phonemic awareness, phonics, fluency, vocabulary, and comprehension. A systematic approach to phonemic awareness, phonics, and spelling is taught through Montessori teacher mini-lessons and classroom manipulative work. We will use the research-based Guided Reading (Fountas & Pinnell, 1996) in conjunction with the core Montessori reading program. Children will explore concepts of comprehension in guided reading sessions, then in a format of literature circles as children develop greater fluency, usually in the Upper EL. Anticipating our need to supplement instruction with reading practice, books and assessment, the school will use Accelerated Reader.

In most preschools, including Montessori preschools there is usually a well-stocked book corner. The difference in Montessori as compared to many preschool programs is that by age 4 to 5 most of the children in the room can read the books, because of the phonics work they did at ages 3-4 in the Montessori classroom. In the elementary a percentage of our students, many of whom have not attended a preschool or a Montessori for ages 3 and 4, will need individualized intervention instruction. Our strong phonics-based, manipulative Montessori reading program works effectively with students who will need intervention. Children with classic or moderate dyslexia, as well as attention deficit and slight to moderate autistic spectrum disorders benefit from the Montessori comprehensive intervention-based reading program. In addition to our strong hands-on phonics emphasis guided reading and writing workshop instruction round out our reading program. Montessori teachers match materials, hands-on language materials, phonics instruction, books, supporting workbooks, and comprehension strategies, to meet each child’s developmental needs. The Montessori Reading and Mathematics scope and sequence will be outlined below.

In The Lower Elementary, Montessori curriculum provides an array of specially developed materials and methods, which allow young children to begin to construct abstract meaning from concrete models and experiences through self-directed activity and teacher/peer interaction. These core materials gradually become less evident in the Upper Elementary as students begin to transition to symbolic and abstract conceptual understandings. Montessori Middle School methods are then rooted in active, applied learning. Students connect with larger communities through project-based and service learning activities that require the integration and application of skills in real-world contexts. Interdisciplinary, student-driven projects, such as local environmental research on Lake Apopka, student-generated business endeavors, and community contributions are at the heart of the Montessori Middle School experience, while textbooks and technology will be used to reinforce fluency in core subject skills.

**“The role of education is to interest the child profoundly in an external activity to which he will give all his potential”  
-Maria Montessori**

*Middle School students attending WOMCS will have lessons in Language Arts, Math, Geometry, History and Social Studies, Science, P.E., Creative Arts, Spanish, and Practical Skills.* These lessons are mostly given within large blocks of instructional time (1.5 – 3 hours), in the context of class projects which address each student’s need to receive new lessons, gather new information, practice new skills, and make new connections with people and ideas. Montessori suggested five themes underlying the Middle School curriculum: Humanities, Occupations, Self-Expression, Connection to Nature, and the Living Community. There will be two Middle School classroom groups of 7<sup>th</sup> and 8<sup>th</sup> graders, with two teachers each. The plan is to place a Math/Science teacher and a Humanities teacher in each 7<sup>th</sup> and 8<sup>th</sup> grade combined classroom. The Montessori Middle School model offers students an experiential, project-based learning from a strong core curriculum that substantially exceeds Next Generation Standards, and leaves graduates well prepared for competitive High School programs. Most importantly, WOMCS students build practical life skills, an empowering sense of their abilities, and a community perspective that prepares them for the challenges of adulthood.

- *Humanities:* Building on the Montessori lessons of Cosmic Education in 6-12, our middle school teachers present an annual cycle of lessons that spans human history. Rather than skimming the surface, key historical events and themes are studied in depth each year and related to the students’ place and time, guiding students to connect the past with the present and leading to a sense of life purpose. Language Arts, History, and Social Studies are taught within Humanities.
- *Occupations:* Place-based education leads us to projects that investigate our relationship to the environment and give us the opportunity to practice what we learn in the classroom. Science, applied Math, and Practical Life skills are taught within Occupations. This area also includes Micro-Economy projects, where our students engage in projects to earn money for the class. For example, making baked goods from scratch and marketing them at a morning “coffeehouse” provides students with life-skills lessons in planning, cooking, marketing, money management, and collaborative work.
- *Self-Expression:* Adolescence is a creative time in which learning different forms of expression can help students gain confidence and nurture talents and skills they may not know they possess. Creative Arts and Spanish will be covered in this theme. WOMCS will integrate a variety of artistic, speaking, musical, drama and physical education electives, offering students an array of elective projects and opportunities. For example, students may work in an art studio, or on a theatrical production in the Garden Theatre here in downtown Winter Garden.
- *Connection with Nature:* Most of our students will come from neighborhoods and subdivisions fairly removed from nature, which heightens our need to become aware of the natural world that supports human life. Students will be actively working with organizations like Friends of Lake Apopka to help create a cleaner, more sustainable lake environment and natural habitats, and the Oakland Nature Preserve to study authentic Florida plants, biomes, animals and new methods to protect and educate others about Florida’s beautiful natural environment. Students explore all areas of Science, including organic and inorganic Chemistry, Biology, etc. through hands-on project-based learning.
- *Living Community:* The experience of community, of belonging, becomes most critical during adolescence. The students’ growing ability to be more independent and the growing need to earn respect in the adult world compels us to give them more responsibility and freedoms than they had in the elementary program. Classroom council meetings, helping with the younger students, working in a mixed age group,

and sharing in the care of the classroom help to nurture mutual respect, community values, responsibility to the group, and social participation.

West Orange Montessori Charter School will be an engaging learning community for our seventh and eighth grade students. Middle School methods are rooted in active, applied learning. Students connect with larger communities through project-based and service learning activities that require the integration and application of skills in real-world contexts. Interdisciplinary, student-driven projects such as environmental research, student-generated business endeavors, and community contributions are at the heart of the Middle School experience, while textbooks will be used to reinforce fluency with basic skills. Studies show that students who stay in the K-8 age grouping, rather than attending a separate Middle School or Junior High, perform better academically, feel more secure, and are able to create a strong sense of self-confidence and self-esteem. Located in our culturally rich Orlando area, WOMCS gives students challenging academic work that allows them to explore the world outside the classroom, be creative and independent, and have a sense of responsibility to humanity. Based on the principles of Dr. Montessori, our program cultivates inquisitive minds and instills a lifelong love of learning, with the ability to put plans into action. By participating in the environment that surrounds the school, students combine practical experience with academic studies to build a greater, more profound connection to the world.

#### 4. Describe the research base for the educational program and/or curriculum approach.

**“Dr. Maria Montessori the first woman physician in Italy, opened a school in January 1907, in a slum in Rome, to test some new theories she had about children’s learning and development. A century later, psychology research is showing that her educational theories were ahead of their time.” -Angeline Lillard**

*“Montessori pedagogical principles are rooted in a social movement intended to champion the cause of all children, in all strata of society, of all races and ethnic backgrounds, within and beyond educational institutions. The Montessori movement is recognized to have started on January 6, 1907 when Dr. Montessori opened the first Casa dei Bambini in San Lorenzo in Rome. What followed has been called the “discovery of the child” and the realization that: “...mankind can hope for a solution to its **problems**, among which the most urgent are those of peace and unity, only by turning its attention and energies to the discovery of the child and to the development of the great potentialities of the human personality in the course of its formation.”*

*“Montessori is the single largest pedagogy in the world with over 22,000 schools on 6 continents. The Montessori movement however is far broader and works to assist children and their families in a variety of settings. Montessorians serve as advocates for all children, championing the rights of the child in society.” (AMI)*

**The Comprehensive School Reform Demonstration (CSRD) program, approved and funded by the U.S. Department of Education, has named Montessori as a research-based program supported by reliable research and effective practices.** Applicable quotes:

- *“Montessori students consistently outperform their peers in reading and math; even those who only attend Montessori preschool continue to outscore peers in reading and math.”*
- *“Montessori magnet schools have a track record of having accomplished the goals of desegregation, parental choice, and student achievement. They typically rank in the upper one-third of the schools in their district on achievement test scores, and they usually reflect the ethnic and racial makeup of their communities.”*

We provide evidence from the Montessori Public School Consortium, which includes reading research statistics.

- *“Montessori achieves results. Magnet school test scores indicate a significant percentage of students scoring in the “high performance” category (77th through 99th percentiles) in vocabulary, reading, and math.”*
- *In reference to the Montessori reading program and gifted students – “The methods used in Montessori schools are highly effective with both learning-disabled and gifted learners; the reason for their effectiveness, however, is that the learning environments have been designed to ensure success for all children.”*

The Montessori educational method and curriculum has consistently proven successful in over one hundred years of research and study, and in most countries around the world. Montessori's success as a prominent surgeon helped her to focus on other areas of medicine such as brain research. In addition, she was one of the first physicians to integrate brain research with children's learning styles. This expertise helped Montessori develop an effective research-based curriculum to meet the educational needs of all children (Devich 2000). The American Montessori Society and The Association of Montessori International site numerous other research articles on their web sites. **Most recently, Lillard's study of the effectiveness of Montessori education published in Science Magazine.**

(Montessori: The Science Behind the Genius, 2005)

- According to Angeline Stoll Lillard, educational and psychological research supports:
  1. Children learn best when they are allowed to move, manipulate, and do things, rather than simply watch and listen to lessons. Montessori does this by design, and the hands-on learning materials are world famous. Movement and cognition are closely entwined.
  2. Children tend to learn more and become more emotionally mature and well balanced, when they have a sense of freedom, choice, and control over their lives. Considerable freedom of movement and choice of activity are basic aspects of Montessori. The culture of the Montessori class is peaceful and based on partnership and respect.
  3. Children learn better when they are interested in what is being taught. Montessori teachers follow their students' interests and nurture their curiosity and imagination, while ensuring that essential skills are learned.
  4. Tying extrinsic rewards to learning- such as giving high grades for doing well on a test or rewarding children for getting good grades- tends to backfire. Students tend to lose their motivation to engage in that activity once the reward is no longer offered. Montessori cultivates children's self-motivation; our classroom assessment approaches are holistic, and students don't compete against each other for grades.

5. *Collaborative learning with other students tends to facilitate learning. In traditional schooling, teachers give lessons and children rarely learn from each other. In Montessori, children work and learn from, and with, each other all the time.*
6. *Learning situated in meaningful contexts is often deeper and richer than learning in abstract texts. In traditional schooling, children sometimes learn without understanding how their learning applies to anything besides school tests. In Montessori, children learn by doing and learning is situated in real-world application and contexts.*
7. *Particular forms of adult interaction are associated with more optimal child outcomes. While traditional education is sometimes authoritarian, and progressive schools may be too permissive, Montessori follows an authoritative approach known to be associated with the most optimal child outcomes. Montessori's authoritative approach is both highly structured and consistent, while being warm and empathic. Kind, courteous, and responsible behavior is the norm in Montessori programs.*
8. *Order in the environment is beneficial to children. Montessori classrooms are very well organized, both in terms of layout and design. While the very carefully designed Montessori prepared environments may turn some people off, research suggests that order is very helpful to learning and children's long-term development. (Science Magazine, 2006)*

**Jane Carol Manner (Florida International University: "A Comparison of Academic Achievement Between Montessori and Non-Montessori Students in a Public School Setting", 1999)** studied two groups of second grade students from "a large, urban, public school district in southern Florida," one Montessori and one traditional. Students from the groups were paired based on nearly identical scores in either reading or math in the first year. Manner found no initial difference of significance in mathematics (as measured by the Stanford Achievement Test) between the Montessori and traditional student groups. However, testing in the second year of the study reportedly showed the Montessori group surpassing the traditional group by 3 percentile points. This gap increased to over 7 percentile points during the third year of the study. In reading, Manner found that Montessori students, again matched with traditional students with nearly identical initial scores, surpassed the traditional students' scores in the second year. This trend continued in the third year. Within the reading component of her study, Manner found that Montessori students' scores surpassed both the matched pair traditional students and the district's traditional students as a group.

4. Explain how the educational program aligns with the school's mission.

**“Education is a natural process carried out by the human individual, and is acquired not by listening to words, but by experiences in the environment.” – Dr. Montessori**

*Our mission statement informs every aspect of our school.* WOMCS seeks to be an authentic Montessori School, and therefore our Montessori values will inform our educational program, governance, policies & procedures, philosophy, planning, and approach with children and adults. The mission states:

*“West Orange Montessori Charter School cultivates a joyful, authentic Montessori Education for children in kindergarten through eighth grade, guiding each child to academic excellence, and toward their unique purpose and responsibility in our global community.”*

*In the Educational Program-* Authentic, joyful, and when thoughtfully and comprehensively implemented the Montessori method quite naturally fits every child, because it is designed around researched child development theories as to how children construct their knowledge. True Montessori is a joyful daily experience for students and teachers alike, because it works. Children respond enthusiastically inside a Montessori classroom, and this naturally motivates them to achieve. True Montessori classrooms are lesson- driven, child appealing, and individualized to help children exceed most expectations. Children are guided to reach their potential academically, personally and socially. True Montessori inspires the elementary child to develop an awareness of other people and to participate with them in making the world a more peaceful, productive place. This is congruent with Dr. Montessori’s mission for helping children develop into intelligent, caring members of a global community in order to promote a more peaceful world. It means quite simply, that children’s developmental needs are being met.

*In Governance-* The Montessori philosophy is a way of approaching life and learning, with a desire to help, to understand, and to respect. School governance policies and procedures are based upon these shared values, and keep our educational community focused upon the school-wide goal of helping children grow and achieve, and supporting all the members of the learning community.

*In Policies & Procedures-* Established upon the Montessori values of respect and responsibility, school policies and procedures, which effect children and adults in the school community, reflect and support the school’s mission to cultivate personal excellence and responsible, sensitive behavior.

*In Program Planning-* Planning follows the Montessori philosophy of multi-age groupings, specially trained teachers, and creating meaningful learning environments for children. The future school site is located on 2.3 acres, and has been selected by the Founding Board, because it meets the Montessori goals and ideals necessary to create a unique hands-on learning environment for elementary and middle school aged children. The graceful former Bed and Breakfast sits on 2.3 acres shaded by mature oak trees, a small lake, natural walking paths, and outdoor classroom spaces. This site location selection is an excellent example of the Montessori mission informing school and program planning. The site has not been secured by a lease agreement to date. *Donations for facilities will not materialize until after charter approval.*



5. Explain how the services the school will provide to the target population *that will help them attain* the Next Generation Sunshine State Standard as required by section 1002.33, F.S.

*The Montessori Educational Program successfully prepares EVERY child to meet or exceed the benchmarks outlined in the Next Generation Standards.* The comprehensive, developmentally appropriate Montessori academic curriculum will assist each child in the successful attainment of the Next Generation Standards. The Next Generation Standards are embedded in the Montessori Curriculum. The Montessori Curriculum and the Next Generation Sunshine State Standards will be professionally correlated together for every subject and instructional level of our charter school, providing a master instructional tool. These correlated standards will guide individual and differentiated instruction in the classroom, providing students with the means to demonstrating academic success in all core subjects and grade levels. The Montessori K-8 curriculum provides an excellent academic preparation, and the alignment/correlation will assist teachers in the timing of specific lessons within the comprehensive Montessori curriculum to meet required FCAT testing timelines. Montessori is individualized, and differentiated education and therefore helps every child achieve and attain the state educational standards. (Correlation Examples may be found in the Appendix)

*West Orange Montessori Charter School will provide all necessary services for students to help each child be successful at school.* A part-time ESE Specialist will be employed, as well as an ELL specialist, and accommodations will be put in place both instructionally and during assessments for students with IEPs. Speech Pathologists, Psychologist and Guidance personnel will be contracted as needed by the school to fully meet the needs of our students. We also plan to offer annual Visual and Hearing Screenings, as well as adding an RN and a clinic in year 4-5 to serve students. Nutritional services will be provided in the form of healthy, protein-rich lunches, participating in the NSLP to offer free and reduced meals to qualified children. Healthy eating habits and nutritious meals play a strong role in attention, concentration and academic achievement, so we will host parent educational events on healthy, budget-conscious meal preparation and effective proportions of protein, appropriate carbohydrates, and good fats in every meal. Students will participate in a community garden, learning to grow fresh vegetables, and fruits and in the process of similar activities will gain greater understanding of the need to cultivate healthy eating and exercise habits. Physical Education, Cooperative Games, Outside lesson activities and Yoga will help children appreciate physical activity, fresh air, and the natural environment we live in. WOMCS seeks to help and aid in the development of the whole child, her intellect and cognitive abilities, her changing emotions, her physical wellbeing and social awareness.

6. Explain **how** students who enter the school below grade level will be engaged in and benefit from the curriculum.

**“We cannot make a genius. We can only give to each individual the chance to fulfill his potential possibilities.”**

- Dr. Maria Montessori

*WOMCS welcomes, anticipates, and plans for a percentage of children to enter our charter program who are currently working below grade level for various reasons.* One of our charter goals is to make Montessori education more accessible to the whole community, and to help children achieve using this educational model. Many children will not have had the opportunity to participate in a Montessori 3-6 Primary classroom, or perhaps ever experienced a preschool program. Montessori, because it is an individualized and differentiated hands-on curriculum, is the most appropriate educational environment to meet the needs of the child who is struggling, as well as enable him to exceed previous achievement expectations. The Montessori hands-on learning method has proven highly successful with learning-disabled children, and continues to

effectively reach children of various abilities. Our Personalized Education Plans, appealing learning materials, individual and small group lessons, and the logic and beauty of the Montessori prepared environment all work harmoniously to actively engage the child. It has never been very difficult to engage a child in the carefully prepared Montessori classroom. Montessori teachers are highly educated and trained in all stages of child development, involving techniques to reach a full spectrum of learners. Meeting the educational and developmental needs of every child eliminates many behavioral issues and previous concerns. Our Montessori educational program includes:

- *Inclusive Community.* Students learn quickly that in a Montessori classroom different aged children work at a variety of tasks and levels, and that peer-coaching and collaborative learning are encouraged. At WOMCS the classroom will be an inclusive environment where it is acceptable and the norm to be “different” and where all members of the group are respected for their uniqueness. As a result, like all Montessori classrooms, WOMCS will be an emotionally safe culture and environment. Our goal is to help each child exceed all achievement expectations.
- *Individualized Approach.* Students are viewed and valued as unique individuals in Montessori classrooms, therefore they work at a range of levels and tasks with a variety of materials and supports. During the morning’s extended work period, for example, the limited English student may spend extra time with his older reading buddy or a parent volunteer, the physically disabled student may spend more time with an art activity, and the student who is weak in math may spend extra time practicing his skills using the Montessori math materials. Teachers monitor and plan for areas of individual weakness and provide for a necessary complement in learning, which is student choice and initiative.
- *Home-School Partnerships.* WOMCS will focus on parent engagement as a significant element for student success. A Parent-coordinator and parent-support committees will work to provide outreach and support for new and diverse families, as well as relevant parent education forums. Parent education forums will include topics such as literacy, nutrition, homework, and discipline, normal child development, as well as other topics recommended by parents. Another important benefit for families attending WOMCS, is that students will remain with the same teacher for several years, cultivating long-term relationships and commitments to individual student achievement. Teachers will work closely with parents and students to design Individual Learning Agreements, including identifying specific ways parents and the school will commit to supporting student success. The school seeks to be an active partner to help support area families with the incredible task of raising educated, caring, and responsible young people.
- *Specialist Support.* WOMCS will contract with OCPS ESE specialists who will assess and make recommendations for those children with atypical learning needs. Teachers will consult with an IEP ESE staff specialist, occupational and physical therapist, speech and language pathologist, and/or a psychologist in order to understand student needs and to plan supports for each child’s success. Identified learning needs will be articulated in students’ Annual Goals and will be addressed through quarterly Individual Learning Agreements. Specific accommodations will be made for each individual.

1. If the school intends to replicate an existing school design:

Provide evidence that the existing design has been effective and successful in raising student achievement.

*The effectiveness of an existing school design can be demonstrated by providing evidence of organizational viability and the success of the academic program, including compliance with legal requirements, as well as a direct relationship between program elements and student achievement.*

*Although WOMCS will not be replicating a specific school, we continue to research and adopt sound practices from existing high-achieving Montessori and other charter schools in Florida and Massachusetts, implementing proven strategies and approaches to policy and sustainable charter program creation. The Executive Director has relevant experience opening and operating two highly successful private Montessori Schools, in addition to offering a broad network of experienced Montessori educators for support in the public school arena. The Founding Board and Executive Director have spent considerable time researching and visiting area Charter Schools, such as Lakeland Montessori School, Lake Eola Charter School, Hope Charter, and Oakland Avenue Charter School. Highly successful Massachusetts Montessori Charter Schools, such as River Valley Charter School, and Hill View Montessori Charter School have provided inspiration, wisdom and direction as we plan and create West Orange Montessori Charter School here in Central Florida. We believe it is not wise to reinvent the wheel, and so WOMCS seeks the experienced counsel from educators who are successfully improving achievement in the Charter School realm.*

2. Describe the applicant's capacity to replicate an existing school design.

*The capacity to replicate can be demonstrated by providing credible and well-defined strategies for replication, including the financial and human resources necessary to replicate the design.*

*The Charter Applicant will not be "replicating an existing school design", however we are researching and studying other successful charter school models. The Director-Applicant has relevant and proven previous school-building experience. Michelle Dulany has opened and operated two very successful, private Montessori Schools, the first opened in September 1999, in the Bath/Brunswick area of coastal Maine. This well-respected private school operated successfully for 9 years with a Primary Classroom (3-6) of 45 children including full day Kindergarten, and an Elementary Classroom of 15 first through third graders, commonly called (6-9) Lower Elementary. The school was closed after the founders' relocation to central Florida in 2007.*

Operating successfully now for three academic years, West Orange Montessori School is a Primary (3-6 year olds) Program serving 45 preschool aged children from surrounding communities. This new preschool Montessori opened its doors to families from Winter Garden, Ocoee, Metro West, Oakland, Clermont and Windermere in the Fall of 2007.

The Director-Applicant possesses a strong history of successful educational leadership and administrative experience founding and operating successful Montessori School programs for over 12 years, as well as holding a Masters of Arts degree in Education, with a concentration in K-12 School Administration. Previous teaching experience includes a combined 2 & 3<sup>rd</sup> grade classroom, teaching Middle School Life Science, as well as teaching and leading the Montessori classrooms in Maine and Florida. In addition to holding a Masters in Education/K-12 School Administration, the Director-Applicant also holds all AMS Montessori Teaching Certification for Primary (3-6), and Elementary (6-9) and the (9-12) levels.

*(Appendix C for resumes and references)*

## D. Curriculum Plan

1. Describe the school's curriculum in the core academic areas, illustrating how it will prepare students to achieve New Generation Sunshine State Standards.

**“We have seen that instruction and development do not coincide. They are two different processes with very complex interrelationships. Instruction is only useful when it moves ahead of development. When it does it impels or wakens a whole series of functions that are in a state of maturation lying in the zone of proximal development”**

**Lev Vygotsky**

*The Montessori academic curriculum has clear and pervasive overlay with the Next Generation Sunshine State Standards, with a shared commitment to the development of core academic skills, such as Reading, Math, Science and History. In the Lower Elementary, Montessori curriculum provides an array of specially developed materials and lessons. These encourage young children to construct abstract concepts using concrete materials, models and experiences through self-directed activity, peer collaboration and teacher interaction. These core materials become less evident in the Upper Elementary as students begin transitioning to symbolic and abstract conceptual understandings. Montessori curriculum also draws attention to certain academic subjects that are often underdeveloped in many public schools, such as calculation, geometry, grammar, anthropology, geography, foreign languages, and economic geography. Below is an outline of overarching academic, personal and social goals for the students of West Orange Montessori Charter, followed by curriculum details.*

- *Goal for the Development of the Student:* WOMCS students will see their education as an incredible intellectual and personal journey. They will be independent, confident learners who meet rigorous standards of academic and personal achievement, be excited by and crave learning, and be motivated to take the next steps in their education, community lives, and work beyond the school.
- *Academic Achievement Goals:* Upon completion of the 8<sup>th</sup> grade, students will be able to demonstrate proficient or advanced competencies in Core Subjects: Reading, Written and Oral Communication, Mathematics, Science, History and Social Studies, and Geography as defined in the WOMCS Montessori Benchmark Portfolios and the Florida Next Generation Standards. Students will demonstrate habits of self-discipline, intrinsic motivation, persistence, intellectual risk-taking, and independence.
- *Personal Achievement Goals:* Upon completion of the 8th grade, students will be able to evaluate and reflect on their work according to defined criteria. Students will be able to plan and work toward achievable goals through self-directed activity. Demonstrate Montessori-based values of grace, courtesy, respect, empathy for others, and responsibility.
- *Goal for the Development of the Student within the Community:* Students will understand their place within larger communities and be able to contribute productively through peaceful attitudes, effective conflict resolution, creative problem solving, responsible action, and purposeful follow-through. Students will have contributed positively in collaboration with communities through projects and events.
- *Social Achievement Goals:* Upon completion of the 8th grade, students will comprehend and appreciate community in different contexts (global, environment, town, school, classroom) and demonstrate respect for all people and cultural aspects in diverse communities. Students will integrate and apply academic competencies, problem solving, and critical thinking skills to improve a community. Students will apply conflict resolution skills to achieve progress for individuals or a group.

## An Outline of the Core Montessori Curriculum:

### Mathematics Great Lesson: *The Story of Numbers*

Students will use a range of Montessori materials to explore concepts extensively in concrete form before abstracting and integrating them. Montessori curriculum addresses the Mathematics objectives in the Next Generation Standards K-8. Number Sense and Operations, Base-ten numerations and Place Value, Algebraic concepts, Fractions, Decimals, and Geometry receive especially strong and effective emphasis in Montessori curriculum. Timing of lessons will align with Next Generation Standards. Students are typically introduced to numbers at age 3: learning the numbers and number symbols one to ten: the red and blue rods, sand-paper numerals, association of number rods and numerals, spindle boxes, cards and counters, counting, sight recognition, concept of odd and even.

- *Introduction to the decimal system* typically begins at age 3 or 4. Units, tens, hundreds, thousands are represented by specially prepared concrete learning materials that show the decimal hierarchy in three dimensional form: units = single beads, tens = a bar of 10 units, hundreds = 10 ten bars fastened together into a square, 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 9,999 and to read them back, to read and write numerals up to 9,999, 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.
- *Lower EL (6-9): 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 concretely. (This process normally begins by age 4 and extends over the next two or three years.) 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 concrete math materials*. (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 concrete materials. (Typically begins at age 5 and is normally completed by age 7.)
- *Development of further abstract understanding of addition, subtraction, division, and multiplication with large numbers* through the Stamp Game (a manipulative system that 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. (Age 5-6) Developing 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 concrete materials*. Eventually, the materials are no longer needed.
- *Development of the concept of long multiplication and division through concrete work with the bead and cube materials*. (The child is typically 6 or younger, and cannot yet do such problems on paper without the concrete 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. (Normally by age 7-8)
- *Development of still more abstract understanding of "long" multiplication through highly advanced and manipulative materials* (the Multiplication Checkerboard). (Usually age 7-8)
- *Development of still more abstract understanding of "long division" through highly advanced manipulative materials* (Test

Tube Division apparatus). (Typically by age 7-8)

- *Solving problems involving parentheses, such as  $(3 \times 4) - (2 + 9) = ?$  (early Algebra)*
- *Missing sign problems:* In a given situation, should you add, divide, multiply or subtract?
- *Introduction to problems involving tens of thousands, hundreds of thousands, and millions.* (Normally by age 7.)
- *Study of fractions:* Normally begins when children using the short division materials who 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 very concrete materials (the fraction circles), and involves learning names, symbols, equivalencies common denominators, and simple addition, subtraction, division, and multiplication of fractions up to "tenths".
- *Study of Decimals.* (Normally by age 7-9)
- *Study of decimal fractions:* all four mathematical operations. (Normally begins by age 8-9, and continues for about two years until the child totally grasps the ideas and processes.)
- *Practical application problems, or word 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.
- *Money: units, history, equivalent sums, foreign currencies, (units and exchange).* (Begins as part of social studies and applied math by age 6.)
- *Interest: concrete to abstract; real life problems involving credit cards and loans; principal, rate, time.* (9-12, Middle)
- *Computing the squares and cubes of numbers:* cubes and squares of binomials and trinomials. (Normally by age 10)
- *Calculating square and cube roots:* from concrete to abstract. (Normally by age 10 or 11)
- *The history of mathematics and its application in science, engineering, technology & economics.*
- *Reinforcing application of all mathematical skills to practical problems around the school and in everyday life.*
- *Basic data gathering, graph reading and preparation, and statistical analysis.* (6-9, 9-12, Middle)
- *Sensorial exploration of plane and solid figures at the 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.
- *Geometry-Stage I: Basic geometric shapes.* (Age 3-4, K)
- *Stage II: More advanced plane geometric shapes-triangles, polygons, various rectangles and irregular forms.* (Age 3-, K, 6-9)
- *Stage III: Introduction to solid geometric forms and their relationship to plane geometric shapes.* (3-6, K, 6-9)
- *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. (3-6, K, 6-9, 9-12)
- *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.* (Continues through age 12, Middle in repeated cycles.)
- *Congruence, similarity, equality, and equivalence.* (6-9, 9-12+)
- *The history of applications of geometry.* (6-9, 9-12+)
- *The theorem of Pythagoras.* (6-9, 9-12+)
- *The calculation of area and volume.* (9-12+)
- *Middle School students will use a math textbook to guide core content skill development in relation to the Correlation/Next Gen Standards. Students will engage in skill integration and application through in-depth project-based curriculum. The project-based curriculum will provide students many opportunities to develop and apply new skills in areas such as data analysis and problem solving.*

## Language Arts

Great Lesson: *The Story of Writing / The Story of Language*

**All of the state required components of reading are taught in the Montessori program: phonemic awareness, phonics, fluency, vocabulary development, and comprehension.**

Reading serves as the building block for the entire curriculum and is interwoven throughout all aspects of it, making reading a primary focus of the student's activities. The Montessori curriculum stresses the

interrelatedness of reading and writing and promotes an integrated approach where reading and writing occur across the curriculum. Phonemic awareness, direct instruction in phonics, word study, grammar, and vocabulary development are essential components of the curriculum, as well as developing fluency and comprehension skills. The Montessori Language Arts Scope and Sequence includes comprehensive and sequential phonetic practice, phonetic writing and reading, spelling, sight words, and all blends and phonograms using appealing hands-on materials, giving each child a solid foundation for fluent (total) reading. Fountas & Pinnell provides a cohesive and complimentary framework for the Montessori reading program. Each morning Reading Workshops will provide children with whole group, small group, and individual lessons in reading. These include guided reading, interactive read-alouds, literacy circles or book clubs, individualized phonics mini-lessons and independent reading. Teachers will listen to students read aloud, taking running records and assessing student reading progress, as well as hold weekly reading conferences. Writing workshops, daily journal writing, composition and writing process practice, writing for publication, handwriting, root words, Latin, sentence analysis and grammar, great literature and author studies, poetry, writing and sharing poetry, storytelling, and drama round out some of the other activities included in our Montessori Language program.

**The Comprehensive School Reform Demonstration (CSRD) program, approved and funded by the U.S. Department of Education, has named Montessori as a research-based program supported by reliable research and effective practices. Applicable quotes are:**

- *“Montessori students consistently outperform their peers in reading and math; even those who only attend Montessori preschool continue to outscore peers in reading and math.”*
- *“Montessori magnet schools have a track record of having accomplished the goals of desegregation, parental choice, and student achievement. They typically rank in the upper one-third of the schools in their district on achievement test scores, and they usually reflect the ethnic and racial makeup of their communities.”*

Evidence from the Montessori Public School Consortium, which includes reading research statistics:

- “Montessori achieves results. Magnet school test scores indicate a significant percentage of students scoring in the “high performance” category (77th through 99th percentiles) in vocabulary, reading, and math.”
- In reference to the Montessori reading program and gifted students – “The methods used in Montessori schools are highly effective with both learning-disabled and gifted learners; the reason for their effectiveness, however, is that the learning environments have been designed to ensure success for all children.”

The Montessori Reading Curriculum is an enriching program for gifted students – the depth and breadth as well as the individualized nature of the Montessori curriculum ensures that the needs of gifted children will be met. Students in the Montessori classroom are active participants in the learning process and are intrinsically motivated to achieve higher levels of reading; they read because they want to, not because they have to. **The Montessori Reading curriculum successfully reaches every type of learner, and produces strong achievement results.**

The three types of assessment in the *No Child Left Behind Solution* are fully addressed in the Montessori reading program: screening, diagnosis, and progress monitoring. The program incorporates initial instruction (ii) along with immediate intensive intervention (iii).

*Ongoing reading assessment will be used to monitor student mastery and to determine needs for immediate intensive intervention.*

*Examples are:*

- Daily observation and monitoring of lessons that judge the child's progress and effort towards mastery of phonemic awareness, phonics, fluency, vocabulary development, and comprehension.
- Computerized monitoring to track the child's usage and mastery of the Montessori reading materials and activities.
- FAIR assessments occur three times per year for each student in grades K-3. Assessments help determine whether the child is at grade level in reading.
- Each student is provided web-based access to Accelerated Reader (AR) to increase reading fluency and comprehension.
- Process-focused reading assessments like interviewing and work plans are developed together with the student.
- Observations of reading ability are well documented.
- Performance assessments such as oral reading presentations, portfolio work, and demonstrations.
- Computerized reports are prepared three times per year based on each student's Personal Education Plan. The PEP outlines how the child has succeeded in meeting their individual goals and objectives. These goals and objectives are reevaluated throughout the year with the teacher, student and parents.
- Student Reading Portfolios include samples of student reading work and product (work and product that document reading development in other areas of the curriculum, such as science and geography projects can also be included).

*All of these items, along with similar ongoing assessments in other curriculum areas, are used to provide documentation to parents concerning their child's progress in achieving learning goals.*

### **Pre-Reading**

Due to our multi-age classroom design, our youngest students are constantly exposed to the older children in the class who are already reading successfully. The Montessori learning environment inspires and reinforces in young children a spontaneous interest in learning how to read. We begin to teach reading as soon as that interest is first expressed, typically 3.5 -4.0 years in the Primary (3-6) Preschool/Kindergarten Classroom. Students entering Lower EL (6-9) may need phonemic awareness and direct phonics instruction, and will receive it accordingly.

- Using a total immersion approach, we help the youngest children to develop a highly sophisticated vocabulary and command of the language.
- The children are taught through many early approaches to listen for and recognize the individual phonetic sounds in words. Sequential Phonics individually taught using Sandpaper Letters and the Movable Alphabet.
- We introduce the children to literature by reading aloud and discussing a wide range of classic stories and poetry.
- Naming objects from the world around us, and lessons from materials; vocabulary development; practice writing phonically using Movable Alphabet. Location and dictation games using Movable Alphabet.
- We help our youngest students to recognize the shape and phonetic sounds of the alphabet through the 'sandpaper letters:' a tactile alphabet.

### **Reading**

The development of the concept that printed words are actually someone's thoughts set down on paper. This may take some children much longer than most people realize. Reading assessments at enrollment assist in creating the child's PEP identifying individual reading needs. Daily individual and differentiated lessons provided for every child in the Lower EL 6-9.

- Phoneme practice; Identifying and reviewing sounds; Movable Alphabet- simple blends, encoding c-v-c words; decoding three-three letter phonically controlled words. Object-Word Boxes; Picture-Word Boxes; Progressing to reading Series 1-Bob Books, Primary Phonics, Set 1
- Sounding out and blending simple three or four-letter phonetic words. Typically before age 5, continued practice in 6-9 Lower EL classroom.
- Early exercises to practice reading and to gain the concept of a noun: labeling objects with written name



tags, mastering increasingly complex words naming things that interest them, such as dinosaurs, the parts of a flower, geometric shapes, the materials in the classroom, etc. Later using these words to create booklets in other areas of curriculum, after handwriting develops.

- Learning to recognize verbs: normally 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." Children love to act out the verb command cards.
- Guided Reading (Fountas & Pinnell)
- Extra phonics practice includes individual "Explode the Code" and "Primary Phonics" workbooks.
- 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, beginning in the early elementary grades and continuing until high school graduation.
- Use of the library and reference books on a daily basis for both research and pleasure.
- An introduction to the world's classical children's literature at increasing depth and sophistication.

### **Handwriting**

Control of the hand in preparation for writing is developed through many exercises, including specially designed tasks in the use of the pencil. Such exercises begin with very young children and extend over several years so that mastery is gradually, but thoroughly, attained.

- The young children practice making letters from the time of their first initial "explosion into writing" at age 3 or 4:
- Moveable Alphabets' made up of easily manipulated plastic letters are used for the early stages of phonetic word creation, the analysis of words, and spelling. They 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 (Age 4-6 Kindergarten).
- "Handwriting Without Tears" research based and complements the Montessori philosophy; hands on materials teach upper case letter formation before lower case.
- 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.
- Writing a Daily Diary in Kindergarten; Journal writing in 6-12
- Cursive writing (Typically around age 6)
- Word Processing (Normally beginning around age 7)
- Calligraphy (Whenever the child is interested, often around age 10)

### **Composition**

At an early age, before handwriting has been mastered, the children compose sentences, stories, and poetry through oral dictation to adults and with the use of the moveable alphabet. Once handwriting is fairly accomplished, the children begin to develop their composition skills. Realizing that writing their own words enables them to transpose thoughts onto paper for others to read is an exciting discovery. Children are inspired by the "Story of Writing" Children's writing continues to develop over the years at increasing levels of sophistication. We are structuring our writing curriculum to reflect Nancie Atwell's philosophy of teaching writing with elementary and Middle School age children. Writing Workshop provides format in 6-9, 9-12 and Middle School.

- Composing their thoughts and ideas into a daily journal entry. Dictation with teacher if necessary.
- Preparing written answers to simple questions.
- Composing stories to follow a picture series.
- Beginning to write stories or poems on given simple themes, from great literature.
- Preparing written descriptions of science experiments.
- Preparing written reports. (6-9)+
- Learning how to write letters to others. Pen pals with a school in Maine.

- By age 9, research skills and the preparation of reports become major components of the educational program. Students research areas of interest or topics that have been assigned in depth, and prepare both formal and informal, written and oral reports.
- Creative and expository composition skills continue to develop as the children advance from level to level. Students are typically asked to write on a daily basis, composing short stories, poems, plays, reports, and news articles. In Upper EL (9-12) and Middle School students will write and revise their work with the intention and goal to be published. (Nancie Atwell)
- The Middle School curriculum will center on the development of effective written communication skills through frequent and guided writing, revision, and in-depth critiquing experiences, in-depth investigations with classic and contemporary literature, development of research skills using text and information technologies, and refinement of effective oral presentation and communication within teamwork and public settings. Much of the students' Language Arts work will be integral to the project-based curriculum and applied toward real audiences within these studies.

### Spelling

Children begin to spell using the moveable alphabet to sound out and spell words as they are first learning to read. They 'take dictation' - spelling words called for by the teacher - as a daily exercise. The sequence of spelling, as with all language skills, begins much earlier than is traditional in this country, during a time when children are spontaneously interested in language. It continues throughout their education. We will use the research-based, "Instructional Level Spelling" (Andree Rolfe, 1993,1998), which supports the Montessori phonic-based reading program. Individually placed, children progress to increasingly more difficult spelling words and identifying their patterns. Children are assessed and placed in a "color" level small group with others of similar ability. Throughout the week children practice their list words by making flash cards, and creating sentences. This is a hands-on, enjoyable spelling curriculum.

- 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" or Sight Words of the English language: words that are non-phonetic and are not spelled as they sound.
- Word Study: involving a series of alphabetizing word cards, compound words, contractions, singular-plural, masculine-feminine words, prefixes, suffixes, synonyms, antonyms, homonyms.

### Grammar

The study of the Function of Words or Grammar begins almost immediately after the child begins to read, during the sensitive period when he is spontaneously interested in language. It continues over several years until mastered. The idea is to introduce grammar to the young child as she is 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.

- We 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 and color to represent each element of grammar. For example, the first words in human history are naming words, called nouns, and are symbolized by a solid black pyramid. Black for the oldest element on Earth, carbon, and the pyramid shape represents the stability of nouns. Verbs are action words, and are represented by a large red sphere denoting energy. The children enjoy analyzing sentences by placing the symbols for the appropriate part of speech over each word. Children happily progress in their Grammar work each day.
- Once students have mastered the concrete symbols for the parts of speech, they perform more advanced exercises for several years with grammar boxes set up to allow them to analyze sentences by their parts of speech.
- Sentence analysis: simple and compound sentences, clauses, verb voices, and logical analysis of all sorts of sentences are studied using many different concrete materials and exercises. This normally begins about age 5-6 and continues over several years through out the elementary years.

- Students continue their study of language from the mid-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.
- Greek and Latin Root Words are studied.

### **History & Geography** Great Lessons: *Timeline of Humans.*

During each successive level of education at WOMCS, students will interact with Montessori's Five Great Lessons in increasing depth. These lessons and timelines form the backbone of the History, Geography, Cultural Studies, and Sciences. They are broadly engaging stories that highlight universal themes and encourage vital connections between science and human affairs. The Great Lessons serve to integrate and unify classroom-learning experiences and to inspire children's sense of wonder, curiosity, and motivation about the world around them.

#### **Montessori Great Lessons:**

1. The Story of the Universe
2. Timeline of Life
3. Timeline of Early Humans
4. The Story of Writing
5. The Story of Numbers and Mathematics

#### **Physical Geography**

- The Sandpaper and Continent Globes (Age 3-6 Kindergarten): 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.
- The Puzzle Maps (Age 3-7): 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.
- Land & Water Formations: materials designed to help the very young child understand basic land and water formations, presented in pairs such as island-lake, isthmus-strait, cape-bay, archipelago-chain of lakes, peninsula-gulf. First the children work with three-dimensional models of each pair of Land and Water forms, filling them with water. Then the children learn to recognize the shapes on maps, and learn about and locate famous examples of each kind of Land or Water form.
- Transference to maps: Introduction to written names and various forms of maps, along with early study of the Biomes, Plants and Animals, landscapes, cultures and people of the continents, then specific countries. Flag Study.
- 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, from creation stories to the evidence of contemporary scientific research: 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 6-9)
- The study of coasts and land reliefs: hills, mountain ranges, volcanoes, valleys, plains, etc.; their formation, animal life, and effect on people.
- The study of the hydrosphere: ocean, rivers, lakes, water-cycles. (By age 8)
- Economic Geography; Pin Maps- locating capitals of each country on every continent. Economic and cultural migration of peoples over time. (9-12)

## **Cultural Geography**

Countries are studied in many ways at all levels, beginning in the Primary 3-6 Kindergarten. A number of studies are held every year to focus on specific cultures and to celebrate life together: an example being Chinese New Year, when a class might study China, prepare Chinese food, learn Chinese customs and greetings, 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, language, music, and history. Cultural studies weaves through the entire elementary curriculum.

- Study of the regions, cultures, and natural resources of the United States, including geography, climate, flora and fauna, major rivers and lakes, capitals, important cities, mountains, people, regional foods, and traditions. This begins in the Primary and continues in increasing depth at each elementary 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, until a broad sample from every continent are studied. All aspects of the nation are considered: Biomes, geography, climate, animals, flora and fauna, major rivers and lakes, cities, mountains, people, food, religions, etc.

## **Economic Geography**

- Natural Resources of the Earth.
- Production: How natural resources have been and are being used by human beings.
- Imports and Exports: The interdependence of nations.
- History & the Needs that all people share.
- The basic needs of man 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 the passage of time and historical time is developed through many activities and repeated at deeper complexity from age 5-6 Kindergarten:
  - Telling time on the clock
  - Time-lines of the child's life; A Day in the Life of a Child- simple timeline of 1 day.
  - Time-lines showing the activities of a day, week, month, year
  - Family trees
  - Time-line from the Birth of our planet Earth's and journey to conditions for life to thrive.
  - Timeline of Life- Biological history
  - Time-line of Humans 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 6-9, 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 explorers, peacemakers, 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 three-year cycle of in depth 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 creation 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.

## Science Great Lessons: *Story of the Universe; Timeline of Life*

- Differentiation between Living and Non-living things. Organic-vs-non-organic. (3-6, 6-7 years)
- Differentiation between Animals and Plants; basic characteristics of and differences. (3-6 Kindergarten)
- Study of Animals: Live animal or pictures for discussion; Zoology Puzzles, with Matching 3-Pt Cards including nomenclature for External Parts of Vertebrates: Fish, Amphibians, Reptiles, Birds, Mammals. (3-6, & 6-9) Elementary adds Invertebrates to this expanding zoological study: Insects, Molluscs, Crustaceans, etc...
- Study of Plants: Botany puzzles representing the parts of the Plant, Leaves, Flower, Stem, Roots. Same format as Zoology, progressing towards reading and writing the nomenclature. These Biology lessons follow a live example from nature, and are first used by very young children (3-6) as puzzles, then as a means to learn the nomenclature, and then related to images on 3 pt cards, then traced onto paper, and finally adding the written labels, then making their own "Parts of the Bird", Booklet and used as a first reading experience by the child.
- Nomenclature Cards: External Parts and then Functions of: Plants & Animals: Vertebrate (3-6, 6-9), Invertebrate (6-9) Kinds of, research, and Classification of Animals continues through (9-12), and Middle School.  
Botany: identifying, naming, and labeling the parts of plants, trees, leaves, stems, roots, and flowers. Kinds of Plants are then studied. Research and classification follows.  
Zoology: identifying, naming, and labeling the external parts of mammals, insects, fish, birds, and other animals. (Kindergarten-9) Functions of Animals: Respiration, Circulatory, etc. (6-9); Research & Classification 9-12
- Introduction of the families of the animal kingdom, and identification and classification of animals into the broad families. Introduction to the basic characteristics, life-styles, habitats, and means of caring for young of each family in the animal kingdom. (Age 5-7) Animal life on all seven different Continents; Research continues.
- Introduction to ecology: habitat, food chain, adaptation to environment and climate, predator-prey relationships, camouflage, and other body adaptations of common animals.
- 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 fieldwork collecting specimens or observing.
- Study of evolution and the development of life on the Earth (Age 6 and up) Timeline of Life
- 6- Kingdoms of Life: Plant, Animal, Monera, Protista, Fungi, Extremophiles (6-9), review in (9-12)
- Elementary: focus turns now to Internal Functions of Vertebrates: Movement, Protection, Respiration, Circulatory, Support, and Reproduction. (6-9)
- Advanced study of plants in class, greenhouse and garden: experimenting with soil, nutrients, light, etc. Community garden, ecology (Age 6-9 and 9-12) Deeper, research based botany in Middle.
- Advanced study of the Animal Kingdom: Classification by class and phyla, etc (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)
- 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. Periodic Table, inorganic chemistry, organic chemistry.
- The Three States of Matter : Solid, Gas, Liquid

- Basic atomic theory
- How elements are created through stellar fusion
- Presentation of Stellarnucleosynthesis. (8-12) and use of interactive timelines.
- Elements and compounds
- Mendelov'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
- Animal behavior: detailed observation. (Age 9 and up)
- Anatomy: Systems of the animal and human body. (Age 9 and up)
- Health and nutrition. (Age 9 and up)
- Ecology: Advanced study of the interrelationships of life forms. (Age 9 and up)
- Development of skills in careful observation, recording and describing, and 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. (Scientific method.)
- 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; Middle)
- Geology and mineralogy (9-12, Middle)
- Meteorology (9-12; Middle)
- Astronomy and cosmology (6-9; 9-12; Middle)
- Elementary physics: light, electricity, magnetic fields, gravity, mass. (9-12; Middle)
- Preparing and analyzing all sorts of graphs and data displays; basic statistics. (6-9; 9-12; Middle)

### **Practical Life & Sensorial Skills** *Fine Motor, Self-Confidence, Awareness; Care of Self & Others*

One of the first goals is to develop in the young child a strong and realistic sense of independence and self-reliance. Along with love and a stable environment, this is the child's greatest need. 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 the school and continues throughout the curriculum with more advanced tasks appropriate to the older students. Practical Life activities are presented here as an integral aspect of Kindergarten and early Lower EL preparation of the child for learning.

#### *Early Tasks (Age 3-6 Kindergarten)*

- Dressing oneself
- Learning home address and phone number
- Pouring liquids without spilling
- Carrying objects without dropping
- Carrying liquids without spilling
- Walking gracefully, without knocking into furniture or people
- Using knives and scissors with good control
- Using simple carpentry tools
- Putting materials away on the shelves where they belong when finished
- Working carefully and neatly

- Dusting, polishing and washing just about anything: floors, tables, silver
- Sweeping and vacuuming floors and rugs
- Flower arranging
- Caring for plants and animals
- Table setting-serving yourself-table manners
- Folding cloth: napkins, towels, etc.
- Simple use of needle and thread
- Using common household tools: tweezers, tongs, eye-droppers, locks, scissors, knives
- Increasingly precise eye-hand coordination
- Simple cooking and food preparation
- Dish washing
- Weaving, bead stringing, etc.

*This process continues logically so that older 6-9, 9-12, and Middle School students will learn such practical tasks as:*

- Caring for animals
- Dog training
- Community Gardening
- Sewing
- Recycling and Re-using
- Laundry
- Cooking complex meals
- Working with tools
- Making simple repairs
- Basic auto maintenance
- Getting around on their own: metro, buses, cabs, hiking
- Practice and mastery of test taking skills and strategies
- Computing tax forms
- Making consumer purchase decisions, comparison shopping, budgeting
- Maintaining a checkbook
- Applying for a job
- Earning spending money
- Caring for young children
- Mentoring
- Interior decorating
- Making clothes
- Furniture making & refinishing
- Wilderness survival
- Running a small business enterprise
- Landscaping

### **Sensory Training**

These are foundational 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. Sensorial training provides the foundation for later work in mathematics, geometry and language. Children begin these activities at age 3-through age 6, Kindergarten.

- Discrimination of length, width, and height
- Discrimination of volume
- Discrimination in multiple dimensions
- Discrimination among color tones
- Discrimination among geometric shapes for shape and relative size
- Discrimination among solid geometric shapes by sight and touch
- Solving of complex abstract puzzles in three dimensions

- Discrimination of intensity and nature of sounds
- Discrimination among musical tones
- Discrimination of texture by touch
- Discrimination of weight by touch
- Discrimination of temperature by touch
- Discrimination of scent

*Sensorial skills lead children to practice:*

- Precise and careful observation of the natural world
- Culinary discrimination
- Artistic appreciation
- Architectural appreciation
- Musical appreciation
- Attention to detail

*This above list is meant to be an outline of the Montessori Curriculum for Elementary & Middle School students.*



2. Describe the research base and foundation materials that were used to develop the curriculum.

*Please see above question where program and curriculum research is more fully addressed. Montessori is a world-acclaimed, well-researched educational model designed by a Physician, and based upon child development and scientific observation. One of many studies included here.*

The Comprehensive School Reform Demonstration (CSRD) program, approved and funded by the U.S. Department of Education, has named Montessori as a research-based program supported by reliable research and effective practices. Applicable quotes are:

- “Montessori students consistently outperform their peers in reading and math; even those who only attend Montessori preschool continue to outscore peers in reading and math.”
- “Montessori magnet schools have a track record of having accomplished the goals of desegregation, parental choice, and student achievement. They typically rank in the upper one-third of the schools in their district on achievement test scores, and they usually reflect the ethnic and racial makeup of their communities.”

*We provide evidence from the Montessori Public School Consortium, which includes reading research statistics.*

- “Montessori achieves results. Magnet school test scores indicate a significant percentage of students scoring in the “high performance” category (77th through 99th percentiles) in vocabulary, reading, and math.”
- In reference to the Montessori reading program and gifted students – “The methods used in Montessori schools are highly effective with both learning-disabled and gifted learners; the reason for their effectiveness, however, is that the learning environments have been designed to ensure success for all children.”

The Montessori educational method and curriculum has consistently proven to be extremely successful in over one hundred years of research and study, and is practiced in most countries around the world. Montessori’s

helped her to focus on other areas of medicine such as brain research. success as a prominent surgeon helped her to focus on other areas of medicine such as brain research.

In addition, she was one of the first physicians to integrate brain research with children’s learning styles.

This expertise helped Montessori develop as effective research-based curriculum to meet the educational needs of all children (Devich 2000). The American Montessori Society and The Association of Montessori International site numerous other research articles on their web sites. Most recently, Lillard’s study of the effectiveness of Montessori education published in Science Magazine. *The volumes of available research to validate the Montessori enormous. Please see internet sources for more!*

*Curriculum and Program of study are enormous. Please see internet sources for more!*

3. Describe the school's reading curriculum, providing evidence that reading is a primary focus and that there is a curriculum and set of strategies for students reading at grade level or higher and a separate curriculum and strategy set for students who are reading below grade level.

*The reading curriculum must be consistent with effective teaching strategies and be grounded in scientifically based reading research. Information on reading requirements may be accessed at [www.justreadflorida.com/docs/reading\\_programs.pdf](http://www.justreadflorida.com/docs/reading_programs.pdf)*

**“The child is both hope and a promise for mankind.” –Maria Montessori**

*The Montessori Reading Program meets all research requirements for providing all students with high quality, approved reading curriculum.*

In reference to the Montessori reading program and gifted students – “The methods used in Montessori schools are highly effective with both learning-disabled and gifted learners; the reason for their effectiveness, however, is that the learning environments have been designed to ensure success for all children.” WOMCS will use the Montessori Reading Curriculum for students at grade level and higher, as well as with students who are reading below grade level. Those students who are below grade level will benefit the most from the *Orton-Gillingham-like* Montessori Reading phonics materials, one-on-one lessons and the differentiated curriculum. The Montessori Reading Program fully incorporates initial instruction (ii), and immediate intensive intervention (iii) of the NCLB solution.

**The Comprehensive School Reform Demonstration (CSRD) program, approved and funded by the U.S. Department of Education, has named Montessori as a research-based program supported by reliable research and effective practices.**

All of the FL State required components of reading are comprehensively taught in the Montessori program:

1. Phonemic Awareness
2. Phonics
3. Fluency
4. Vocabulary Development
5. Comprehension

*Reading serves as the foundation for the entire Montessori curriculum and is individually taught as well as interwoven throughout all aspects of it, making reading a primary focus of the student's activities.* The Montessori curriculum stresses the importance of reading and writing, and promotes an integrated approach where reading and writing are supported across the curriculum. Phonemic awareness, direct instruction in phonics, grammar, and vocabulary development are essential components of the Montessori reading curriculum, as well as developing fluency and comprehension skills through individual and guided reading. The Montessori Reading scope and sequence includes items such as intensive practice and review of all phonetic sounds, phonetic writing and reading using movable alphabets, irregular or sight words, phonograms and blends, which with daily practice of skills acquired, all combine lead to fluent (total) reading. Guided Reading, Writing Workshop, Spelling, Word Study/Greek and Latin Roots, journal writing, composition, exposure to great literature, reading and writing poetry, and other literacy-based activities complete our language program.

*Based on current research, West Orange Montessori Charter School will incorporate the Guided Reading program (Fountas & Pinnell, 1996) in conjunction with the Montessori Reading Curriculum as the method for teaching elementary reading and will move to literature groups as children become fluent readers.* Guided reading, a proven and researched based program is only one aspect of our literacy program. The entire program includes language/word study, reading practice, composition-writing workshop, spelling, etc, and guided reading. Guided reading gives students the opportunity to read at their just right level, which means that the books provide them with a moderate challenge. They are grouped with students who are similar in ability, needs, and strengths. Instruction is then finely tuned to the needs of those particular students. Without teaching at the point of need, many students will not progress. By providing small group instruction that

allows children to discover how to think about a text, they will be able to use their strategies in other classroom reading throughout the curriculum. A guided reading lesson is also an opportunity to talk about story elements such as character, setting, plot, metaphors, point of view, and vocabulary, etc. It is also a great time to talk about effective decoding strategies. The purpose of guided reading is to teach individual children to read increasingly difficult texts with understanding and fluency. An individual and sequenced approach to phonics and spelling through teacher guided mini-lessons and classroom manipulative work forms the language/word study component of reading in Montessori. Reading baseline assessments using FAIR will provide screening and assist in creating each child's personalized educational plan, and clarifying reading instructional needs. Individual reading lessons are provided daily for every child in the Lower EL 6-9, and Upper EL as needed, and provide ample opportunities for progress monitoring. Diagnostic tools include the FCAT and SAT10, as well as classroom-based assessments of reading. The Montessori Elementary Reading Program begins with "The Story of Writing", to spark the child's imagination and interest in written communication. Intervention is embedded in the Montessori reading program as outlined above. *Accelerated Reader* will supplement skills with fluency practice and provide frequent reading assessment.

#### Elementary Level Montessori Reading Curriculum & Components:

1. *Phoneme evaluation and phonics practice*; Sandpaper Letters- Identifying initial sounds and sound practice for individual mastery; Movable Alphabet (a box of letters sorted into compartments)-practice of simple blends such as "bl", encoding c-v-c words such as hat, cat, mat; begin decoding three-three letter phonically controlled words. I Spy games, puzzles, etc form attractive phonics practice opportunities.
2. *Pink Boxes*- Object-Word Boxes; progressing to Picture-Word Boxes; then progressing to reading simple, phonically controlled books such as Series 1-Bob Books, Primary Phonics, Set 1. Daily practice reading aloud to an adult at school. The Montessori *Pink, Blue, and Green Boxes* provide child-appealing, individual and small group hands-on practice for every step in phonics mastery. Used with Movable Alphabets. Waseca Phonics Boxes as alternative in elementary.
3. *Blue Boxes*- sounding out simple four-six letter phonetic words, practice blending sounds and increasing word base. Children compose/encode phonically controlled words using Movable Alphabets.
4. *Word Study/Decoding and Encoding/Spelling Words* increasingly difficult phonetic and non-phonetic words using the Movable Alphabets; composing simple sentences and short, original stories using the Movable Alphabet. Instructional Level Spelling Prog.
5. *Green Boxes- Phonograms* Objects/Labels, Pictures/Labels: Silent e, digraphs, diphthongs, r-controlled, /oa/etc. Sight Word – High Frequency word practice.
6. *Early Grammar/Parts of Speech* exercises to practice reading and to introduce and strength the concept of a Noun: labeling objects with written name tags, mastering increasingly complex words naming things that interest them, such as dinosaurs, the parts of a flower, geometric shapes, the materials in the classroom, etc. Later using these words to create booklets in other areas of curriculum, after handwriting develops. Creating a list of personal "naming" words using Movable Alphabet and copying on paper.
7. *Learning to recognize action words-verbs*: normally exercises in which the child reads a card with a verbal "command" printed out (such as run, sit, walk, toss the tissue to a friend, etc.) and demonstrates comprehension through the acting out. Children work in small groups with grammar materials. As the child's reading and vocabulary increases, verbal commands involve full sentences and multiple steps: "Place the mat on the table and bring back a red pencil." Children love to act out the verb command cards.
8. *Guided Reading (Fountas & Pinnell)* in class small reading group practice three -four times per week. Reading aloud with fluency, comprehension, timing, and inflection. Vocabulary expansion and practice is embedded in Lower EL reading activities, and highlighted in Upper EL. Greek and Latin Roots presented in Lower EL.

9. *Supplemental daily phonics practice* includes individual mini-lessons in phonics and spelling, as well as “Explode the Code” and “Primary Phonics” workbooks to reinforce and practice skills.
10. *Reading specially selected or prepared small books on topics that really interest the child*, such as animal and plant books, cultural, geography, nature or historical books.
11. *Teacher-led daily whole group interactive read-aloud* of Non-Fiction, Fiction, Poetry, Rhyming books, cultural folktales, Mythology. Reading and comprehending imaginative/literary and informational/expository text. Reading and literature are celebrated throughout the Montessori curriculum and sequence.
12. *Greek & Latin Root Words*- word study for meaning;
13. *Interpretive reading for comprehension* at ever increasing levels of difficulty, beginning in the early elementary grades and continuing until high school graduation. Accelerated Reader Program for independent reading practice.
14. *Use of the library and reference books on a daily basis for both research and pleasure*. Supervised interplay of technology for research purposes.
15. *An introduction to the world's classical children's literature* at increasing depth and sophistication. Literacy Circles; Book Club; Junior Great Book or other.

4. Explain how exceptional students and students who enter the school below grade level will be engaged in and benefit from the curriculum.

*West Orange Montessori Charter School will work with the guidance of OCPS ESE specialists to identify the special needs of our students, and to meet all applicable Federal, State, and local laws, 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:*

- A non-discriminatory policy regarding identification, location, evaluation and student selection.
- Free appropriate public education (FAPE).
- Individual Education Plans (IEP's), to include an IEP Meeting with the student's parents or guardians.
- Accommodations will be made for ESE students in both instruction and assessments. Instructional accommodations will include accommodations in presentation, response, schedule, setting, and assistance technology.

*WOMCS exceptional Students, will be provided with an inclusive program, or least restrictive environment implemented in accordance with Federal, State and local policies and procedures. West Orange Montessori Charter School will abide by all non-discriminatory policies and procedures regarding the placement, assessment identification and selection; as well as abiding by the free appropriate public education policies. Exceptional students will have an IEP that is followed by classroom teachers, who are supervised by an ESE certified part-time teacher/consultant. Monthly IEP evaluations with staff, parents, and the ESE specialist effectively support the exceptional student. Students with disabilities will be included in the Montessori learning environment, the LRE when possible, however if the disability prohibits this inclusion, the family will be guided to find a more suitable program. It is the goal of WOMCS to include all children in a learning environment where they may flourish and achieve their personal best, which is in the least restrictive environment. Accommodations for instruction and assessment will be implemented. Students whose needs cannot be adequately addressed at WOMCS will be referred appropriately. WOMCS will work closely with OCPS to ensure that the needs of these children are met.*

*Exceptional students, which includes gifted students, as well as students working below grade level benefit from the Montessori learning environment.* Montessori is multi-age, providing important supportive social role models and peer opportunities for the exceptional, as well as children who face the challenge of entering the classroom behind others. Lessons are individualized, and IEP's, or Personalized Education Plans are implemented for every enrolled child, regardless of ability. Children learn better when they have a sense of freedom and choice, and when they are interested in what they are learning. Montessori cultivates self-motivation and discipline, which children of all different abilities respond to positively in the classroom. The exceptional student, whether classified as learning disabled, or gifted, works at his own pace and ability, just as all Montessori students, and finds a classroom in Montessori that respects, challenges and supports his unique cognitive needs, while including him in the social culture of the group. In guided reading for example, the exceptional child is grouped with other children of similar strong ability, reading at the level that is appropriate for him. Likewise, the child who is working below grade level reads aloud with children who share his ability level. Multi-age combined classrooms allow children to observe, grow, and respect the different abilities and work habits of their peers, which supports and motivates their own progression. In a Montessori classroom every child receives an individualized education, and is fully aware that he and his classmates work on their own unique level and pace. Children do not compete against one another for grades and rewards rather they work collaboratively together on common academic problems, projects, and goals. Thus the Montessori classroom is one of profound respect and inclusion, and more effectively prepares our youth to live harmoniously with others. Professional Development for all instructional staff will include, "Dealing with Differences" Training, an ESE Workshop.

5. Explain how ELL students will be engaged in and benefit from the curriculum.

*WOMCS will follow all applicable state and federal laws pertaining to ELL identified students, and will work to support ELL students in the acquisition of the English and the educational tools to achieve at school. This will be accomplished by:*

- A Home Language Survey included in the Enrollment Packet to identify ELL students.
- When preparing the PEP for an ELL student, WOMCS faculty will meet with parents and the ELL specialist to determine the best course and plan instructional modifications. Frequent parent-teacher meetings held to assess student progress.
- If necessary, required ELL services will be contracted out or provided by a certified ELL instructor/consultant.

*English Language Learners will benefit from the Montessori individual and small group lessons in every subject, as well as the low student-teacher ratio of our classroom. WOMCS ELL instruction will combine methods of teaching English as a second language with the curriculum requirements of the Montessori Language Arts program in order to provide ELL students with an equal educational opportunity. The central Florida community is well populated by Latin Spanish speaking families, as well as other languages, therefore we will also work with our classroom teachers to develop and enhance their working knowledge of local languages in our professional development program. We will make available to the school community materials such as the Rosetta Stone Latin Spanish and English Program. We will seek to build strong relationships with all of our families on behalf of their children, and provide the family with a language-contact from our parent community. Working together with the ELL child's parents, using the information from the Home Study, we will provide the personalized support that the individual child will need to successfully achieve his potential within our predominantly English speaking society. WOMCS will evaluate and modify programs as needed based upon the suggestion of ELL specialists and students' needs.*

*Students entering WOMCS who are not proficient in English will be provided with an English Language tutor. A portion of the day will be devoted to intensive, small-group or one-on-one English instruction. Initially, the tutor will shadow the child in the classroom to provide language assistance as the child pursues learning (and nonacademic) activities with other students and the lead teacher. As the child's language ability improves, the tutor will phase out of the classroom, but will continue to provide assistance with reading and writing, leading to weekly monitoring of student progress.*

*The Montessori curriculum is ideal for language acquisition as it gives the child specific nomenclature in every lesson and subject including Biology, Geometry, History, Anthropology, Zoology, Botany, Physical Geography, Political Geography, Science, Chemistry, as well as in Mathematics and Language Arts. Correct pronunciation, enunciation and application of new words are consistently taught across the curriculum school-wide. We will study Greek and Latin root words, parts of speech, and "word study" components of our English language. Children are not passive learners in a Montessori class, but are encouraged to be active participants in small group or individual lessons. This means that no one child can slip through the academic cracks. This active participation by the child provides educators with important insights into each child's comprehension in those moments during the lesson. Addressing the needs of ELL in a Montessori learning environment may be seen as a thoughtful immersion in English. These are some of the many ways that Montessori supports the English Language Learner.*

5. Describe proposed curriculum areas to be included other than the core academic areas.

### WOMCS Elementary Educational Curriculum Specials

**Art Studio**

Drawing  
Painting  
Pottery  
Sculpture  
Photography

**Music**

History /Theory  
Chorus  
Guitar  
Band

**Drama**

History  
Productions  
Performing Arts

**Spanish**

Group Lessons

**Cooperative Games**

**Chess**

**P.E.**

**Yoga**

**Nature Walks**

### Connection To Nature/Environmental Studies

Partnership with Oakland Nature Preserve and Friends of Lake Apopka

*"Specials" are part of every day, and include Art, Music, Spanish, and PE integrated with Cooperative Games, Yoga and Nature Walks.*

*The vision includes providing students with Art Studios for Pottery & Sculpture, Drawing & Painting, and a dark room for Photography.*

*Eventually the school will have a central gathering place, an atrium, where Drama & Performing Arts may be cultivated. We will also provide a shared Science Lab and Library, which will house a Computer & Research lab.*

7. Describe how the effectiveness of the curriculum will be evaluated.

**“One test of the correctness of educational procedure is the happiness of the child.”**

-Dr. Montessori

*The Montessori approach to assessment and reporting derives from the nature of Montessori philosophy and pedagogy. Effectiveness will be evaluated and measured through frequent informal or classroom-based, and state mandated annual formal student assessments.* Assessment in Montessori programs is based on the belief that each child is a competent learner, born ready to learn from the people, and the cultural and material environment around them. The Montessori method facilitates targeted and personalized learning and developmental experiences for each child, the timing of individualized lessons are determined by the detailed observations of each child by the teacher. Teachers and schools consider many types of informal classroom-based assessment tools. In Montessori, teacher-developed informal assessments include anecdotal records, observations, portfolios of student work samples, checklists, informal reading inventories, running records, student reading journals, written summaries, conferences, oral and written retellings. Montessori does not use typical letter or numerical grading systems, rather WOMCS will use anecdotal descriptions, portfolio work samples, curriculum check lists and inventories, and a rubric-style method of reporting student progress to parents. The grading system will include a four-point rubric scoring system that is used to assess work and then recorded next to each standard and benchmark to evaluate the achievement level of those identified parameters. WOMCS will participate in all applicable FCAT student achievement tests.

In Montessori the children work in three-year cohorts, in specially prepared environments, which contain learning materials specifically designed to foster the achievement of appropriate developmental milestones, and the sequential mastery of skills and concepts across the range of disciplines. Montessori materials provide feedback to the child and the teacher as to where the child is at any time on these developmental milestones and in mastery of skills and concepts. WOMCS classroom teachers will also have these Montessori developmental milestones professionally correlated with the State's Next Generation Standards for optimal achievement.

Montessori education is specifically non-competitive, and eschews rewards and punishment in favor of encouraging the development in children of intrinsic motivation for learning. Activities are open-ended, encouraging exploration and creative thinking, and consequently do not lend themselves to grading. Children take ownership of their learning and progress through their daily work journal, weekly individual conferences with their teacher, by requesting specific lessons as the need arises, and by maintaining portfolios of completed work. These materials, and detailed observations of each child by the teacher, form the basis of reporting to parents.

In the final comments of his book, “Literacy Instruction That Works: The Case for Balanced Teaching”, by M. Pressley (2002) states the assessments in classrooms of excellent teachers:

**“Excellent teachers are always informally assessing their students, monitoring where each student is and what each student needs. The excellent teacher acts on that monitoring, providing appropriate instruction or direction to each and every student in the room.”** (p.355) This passage accurately describes the method by which Montessori teachers are trained to assess their students. In my teaching experience through the years I have observed that this informal but sensitive, continuous observation of students becomes an internalized habit in excellent teachers. Observation becomes an internalized professional habit of assessing the students entrusted to your care.

An important aspect of informal classroom-based assessment is to help teachers recognize when a child may not be progressing, especially as a reader. This awareness is not intended to “label” children, but to allow for the matching of different instructional strategies to that child's strengths and challenges so that reading failure

may be prevented. Research shows that if precursors such as delays in the development of phonemic awareness are recognized, they can be remediated through focused instruction, thereby preventing reading failure for many children.

*Frequent Assessment:* Our goal is to assess our students frequently so that we can target our academic interventions and ensure real time response. In this way, not one student will slip through the cracks. The Montessori method provides this continual assessment through every lesson.

The effectiveness of the Montessori curriculum will be evaluated through formal means such as, FCAT and FAIR, as well as informal teacher led classroom assessment tools and methods. *See Below and Assessment Schedule for details.*

#### **D. Student Performance, Assessment and Evaluation:**

State the school's educational goals and objectives for improving student achievement and how much academic improvement students are expected to show.

As required by F.S. 1002.33, this section must include student goals and objectives for improving student achievement. **These goals and objectives must indicate how much academic improvement students are expected to show each year, how success will be evaluated, and the specific results to be attained through instruction.**

**“One test of the correctness of educational procedure is the happiness of the child.”**

**-Dr. Maria Montessori**

*Montessori primary (3-6) teachers typically spend a great deal of time helping children learn how to be self-directed learners and how to benefit from an individualized curriculum.* While WOMCS students who are new to Montessori education will be supported and expected to progress, emphasis for these students will be placed first on building learning habits for success within Montessori education so that students may achieve significant academic growth during their remaining years at WOMCS. It is expected that students' indicators of achievement will increase the longer a student remains at WOMCS. All accountability data will be analyzed for comparable levels of achievement across categories of gender, age, ethnicity, special education, second language, and low-income. Montessori K-8 Educational Goals & Objectives: Montessori Curriculum/Next Generation Standards Correlations provide specific Academic Curriculum Benchmarks for Student Achievement at West Orange Montessori Charter School.

#### **West Orange Montessori Charter School K-8 Program Goals:**

- A. Consistent Academic Excellence demonstrated by a minimum of 1 to 1.2 grade level gains in individual achievement in Reading, Writing, Math and Science implementing the full Montessori K-8 Curriculum; demonstrated through formal assessments.**
- B. Character Development: Personal and Social demonstrated through students who are empathetic, self-disciplined, intrinsically motivated, mentally confident and independent; problem-solvers willing to work passionately to improve their communities; demonstrated through informal assessments.**

#### **West Orange Montessori Charter School Educational Program Objectives**

**A1: Students will demonstrate at minimum of 1 to 1.2 Grade level gains in Reading, Math Writing and Science for each year spent at WOMCS.** Improvement and achievement will be demonstrated, measured and evaluated through informal and formal assessment tools.



**A1:1 Reading Objectives:**

- By July 2014, 90% of all students taking the Reading FCAT at WOMCS will score at Level 3.5 or above.
- By July 2014, 84% of all students taking the Reading FCAT at WOMCS will make learning gains.
- By July 2014, 75% of the lowest 25% of students taking the Reading FCAT at WOMCS will make learning gains.

**A1:2 Math Objectives:**

- By July 2014, 88% of all students taking the Math FCAT at WOMCS will score at Level 3.5 or above.
- By July 2014, 83% of all students taking the Math FCAT at WOMCS will make learning gains.
- By July 2014, 80% of the lowest 25% of students taking the Math FCAT at WOMCS will make learning gains.

**A1:3 Writing Objectives:**

- By July 2014, 95% of all students taking the Writing FCAT at WOMCS will score at Level 3.5 or above.
- By July 2014, 80% of all students taking the Writing FCAT at WOMCS will score at Level 4 or greater.
- By July 2014, 80% of the lowest 25% of students taking the Writing FCAT at WOMCS will score Level 3.5 or higher.

**A1:4 Science Objectives:**

- By July 2014, 92% of all students taking the Science FCAT at WOMCS will score Level 3.5 or above.

**A2: Upon completion of the 3<sup>rd</sup>, 6<sup>th</sup>, and 8<sup>th</sup> grade, students will be able to demonstrate proficient or advanced competencies in Reading, Written and Oral Communication, Mathematics, History, Geography, and Science as defined in the WOMCS Montessori Benchmark Portfolio Standards and the Florida Next Generation Standards.**

**B1: Upon completion of the 3<sup>rd</sup>, 6<sup>th</sup> and 8<sup>th</sup> grade, students will demonstrate high levels of Personal and Social Achievement through the consistent development of habits of self-discipline, intrinsic motivation, persistence, intellectual risk-taking, and independence. Improvement, success, and achievement in the area of Character Development will be demonstrated and evaluated through informal rubric type assessments, from instructors and the self-evaluation of the student.**

**B1:1 Character Objectives:**

- By July 2016, 98% of all WOMCS students completing 3<sup>rd</sup>, 6<sup>th</sup> and 8<sup>th</sup> grades will make character gains as demonstrated on rubric evaluations by faculty and the student.
- By July 2016, 100% of WOMCS students will participate in at least one community service project during each academic year, with increasing student ownership and responsibility demonstrated at each program level.

*Assumption:* Many of WOMCS youngest students will spend their first years at WOMCS building basic Literacy skills. The school's youngest children will be frequently assessed through school-adopted, teacher-directed strategies, and FAIR reading assessments.

*Goal for the Development of the Student:* WOMCS students will see their education as an incredible intellectual and personal journey. They will be independent, confident learners who meet rigorous standards of academic and personal achievement, be excited by and crave learning, and be motivated to take the next steps in their education, community lives, and work beyond the school.

*Personal Achievement Goals:* Upon completion of the 8th grade, students will be able to evaluate and reflect on their work according to defined criteria. Set and work toward achievable goals through self-directed activity, and be motivated by a sense of personal purpose. Demonstrate leadership ability in an area of personal expertise. Demonstrate Montessori-based values of grace, courtesy, respect, empathy for others, and responsibility.

*Social Achievement Goals:* Upon completion of the 8th grade, students will understand community in different contexts (global, environment, town, school, classroom) and demonstrate respect for people in diverse communities. Students will integrate and apply academic competencies, problem solving, and critical thinking skills to improve a community. Students will apply conflict resolution skills to achieve progress for individuals or a group.

*Goal for the Development of the Student within the Community:* Students will understand their unique place within larger communities and be able to contribute productively through peaceful attitudes, effective conflict resolution, creative problem solving, responsible action, and purposeful actions.

*See Assessment Schedule for greater clarity.*

## 2. Describe the school's student placement procedures and promotion standards.

**"A real voyage of discovery consists not of seeking new landscapes but of seeing through new eyes."  
- Marcel Proust**

*All incoming students will be evaluated to create a baseline of academic performance to determine grade level placement. Next, students with previous Montessori educational experience, demonstrated through progress reports, etc, will be placed in their appropriate multi-age grade level. Students with no previous Montessori experience will be placed appropriately for their chronological age and previous educational performance data. Placement of individual students for optimal academic success may require a series of planning sessions with instructional staff, administration, and parents. Our goal at WOMCS is to help children achieve academic success, and so in light of our mission statement, students will be placed in grade levels that will best serve their individual needs.*

*The promotion policy at WOMCS is intended to reflect the mission and the belief that multiple measures are necessary for judging student achievement, and that student achievement can be demonstrated in a variety of ways, including through informal and formal assessments, verbal demonstrations, multi-media presentations and Benchmark Portfolio projects that demonstrate achievement. It is important to remember that teachers and parents at WOMCS are committed to supporting and monitoring student learning throughout each level of the school's programs. It is the responsibility of the professional instructional staff to try to anticipate and address student needs and supports in advance so that students do not fail to make progress. Some students present complicated learning profiles, however, so the school's promotion policy must address these differences and make available a variety of supports and timing for promotion. It is our concern that no student be judged as failing in one skill area due to a weakness in another. (i.e. a student should not be judged as failing in math achievement due to a still developing skill set in written language.)*

In order to provide a range of demonstration opportunities for students, promotion to the next program level at WOMCS, (for example Lower Elementary to Upper Elementary), will be determined through faculty consultation and successful achievement of the WOMCS Montessori & Next Generation Benchmark correlation standards. Since WOMCS benchmarks serve primarily as "promotion standards," most will not be achievable by students until the final year of each program level, grades 3, 6, and 8. (Typically this will occur in the spring of grades 3, 6 and 8.) In general, students who successfully complete 75% or more of the grade 3, 6, or 8 benchmarks demonstrate readiness for promotion in September of the following year. It is also possible, however for students completing only 50-75% of the benchmarks to need more time to complete the grade level benchmarks, but not to benefit from remaining a full year in the current grade. In these cases, promotion will occur as students demonstrate readiness (i.e. "Delayed Promotion"), potentially at some mid-point during the following school year. In fewer cases, those students who are not able to achieve 50% of the benchmarks may need to remain in the current grade level and gain greater command and confidence with the benchmark standards before moving on. Promotion will thus be individualized to benefit each student. WOMCS will recommend that students who do not meet the promotion criteria in grade 8 should return to learn and work for another year, and/or students may opt to take advantage of extra supports identified during student/parent/teacher conferences.

*Since benchmarks are formal demonstrations of student achievement, all student benchmark submissions will be work that is independent of peer and adult support. Benchmark standards will be organized and given by teachers, but the goal is to word them for student use, helping students to envision and assess their own achievement in the learning process.*

3. If the school will serve high school students, describe the school's graduation requirements, to include the methods used to determine if a student has satisfied the requirements specified in section 1003.43, F.S., and any proposed additional requirements.

N/A

4. Describe how baseline achievement data will be established, collected, and used.  
*Describe the methods used to identify the educational strengths and needs of students and how these compared to the academic progress of the same students attending the charter school.*

*WOMCS will assess every child upon enrollment, and will establish baseline achievement data each Fall using SAT10 or similar for grades 4-8th, and FAIR for K-3, to provide initial performance data and to guide instructional planning. In order for WOMCS to achieve our educational goals and objectives as stated, baseline assessments will be collected each Fall to measure student performance and provide yearly baseline information for school administration, the curriculum coordinator and instructional staff. Baseline data will be used for planning student Personal Education Plans, as well as tracking individual, grade level, and school-wide progress and gains through the months leading up to Spring FCATs. This information, along with other relevant student academic records from previous schools will provide the necessary baseline instructional data demonstrating specific strengths and needs of our students. Baseline data will be monitored, tracked and used for future comparison of achievement of the same student while enrolled. WOMCS provides frequent assessment to provide optimal instructional response in real time. Please refer to Assessment Schedule Chart for detail.*

6. Identify the types and frequency of assessments that the school will use to measure and monitor student performance.  
*Include a description of how students will participate in the statewide assessment program and what other assessments will be used to document student progress.*

*Student performance will be assessed with the following tools, all designed to determine and report individual progress toward specific benchmarks defined in the WOMCS curriculum and Next Generation Standards.*

Test-taking skills will be incorporated into the Practical Life area of the curriculum to ensure students are prepared for the mechanics of test taking. In addition to state mandates, test results will be used to inform and update students' PEP's, as well as modify the program curriculum. **Please see below and the Assessment Schedule Chart.**

- **Standardized Tests- Formal Assessments:**

SAT10, or similar- in the fall for baseline performance: 4 - 8th grades

FAIR – in fall and up to three times year for reading assessment for K- 3<sup>th</sup> grades

FCATs – annually each spring for 3 - 8th grades

- **Individual or Informal Assessments:**

Embedded and ongoing in the specific individual and small group Montessori lessons in all core subjects.

Benchmark Portfolio demonstrations; projects, anecdotal records, curriculum inventories, PEP's, and rubrics

**Please note:** *Frequent assessment is integral with, and permeates the Montessori curriculum lessons. In this sense assessment is continually informing learning for each student in a Montessori classroom.* WOMCS will work in cooperation with all DOE and OCPS Accountability and Evaluation services to comply with charter school testing procedures.

6. Describe how student assessment and performance data will be used to evaluate and inform instruction.

*In Montessori Educational Programs, frequent, real time student informal assessment is gathered through individual and small group lessons that are used to inform and further differentiated instruction.*

In his article, "Assessment Crisis: The Absence of Assessment FOR Learning," (Phi Delta Kappan, June 2002), Richard Stiggins states, "If assessments OF learning provide evidence of achievement for public reporting, then assessments FOR learning serve to help students learn more. The crucial distinction is between assessment to determine the status of learning, and assessment to promote greater learning." Montessori provides both congruently and effectively. In addition to real time lesson assessment, Montessori education emphasizes close daily student observation and documentation as the most significant assessment practice for teachers to master. WOMCS believes this is, in fact the centerpiece of effective teaching and learning in the classroom and will invest heavily in high quality, experienced teachers and a dynamic, strong, individualized professional development program. Stiggins continues to list eight necessary actions for assessments to inform and enrich teaching and learning: "When they assess for learning, teachers use the classroom assessment process and the continuous flow of information about student achievement that it provides in order to advance, not merely check on, student learning.

They do this by:

- Understanding and articulating in advance of teaching the achievement targets that their students are to hit;

- Informing their students about those learning goals, in terms that students understand, from the very beginning of the teaching and learning process;
- Becoming assessment literate and thus able to transform their expectations into assessment exercises and scoring procedures that accurately reflect student achievement;
- Using classroom assessments to build students' confidence in themselves as learners and help them take responsibility for their own learning, so as to lay a foundation for lifelong learning;
- Translating classroom assessment results into frequent descriptive feedback (versus judgmental feedback) for students, providing them with specific insights as to how to improve;
- Continuously adjusting instruction based on the results of classroom assessments;
- Engaging students in regular self-assessment, with standards held constant so that students can watch themselves grow over time and thus feel in charge of their own success; and
- Actively involving students in communicating with their teacher and their families about their achievement status and improvement.

In short, the effect of **assessment for learning**, as it plays out in the classroom, is that students keep learning and remain confident that they can continue to learn at productive levels if they keep trying to learn. In other words, students don't give up in frustration or hopelessness." (Stiggins, 2002)

*Using student assessment both for the evaluation of learning, and to inform real time learning is the goal of student assessment at WOMCS.*

7. Describe how student assessment and performance information will be shared with students and with parents.

*Assessment results and reports of student progress will be shared with a variety of audiences through different methods at WOMCS.*

*Students* will gain information about their progress through:

- Daily conversations and individual conferences with classroom teachers,
- Ongoing written feedback on student work,
- Weekly Work Plans and quarterly Individual Learning Agreements.

*Parents* will gain information about student achievement through review of:

- Weekly Work Plans and quarterly Individual Learning Agreements,
- Periodic written and/or verbal teacher/parent communications,
- Ongoing review of returned student work and homework,
- Student exhibitions, performances, and special culminating events,

- Annual review of Student Benchmarks Portfolios
- Annual review of student FCAT and other formal assessment reports,
- Annual school-wide oral and web-based presentation and explanation of school-wide data
- Fall and Spring Parent-Teacher or Parent-Student-Teacher Conferences, and
- Annual written Progress Reports.

*Teachers and Administrators* will understand student progress through:

- Ongoing classroom-based assessments,
- Annual detailed analysis and discussion of student and school-wide FCAT and baseline results,
- Annual review of student Personalized Education Plans, quarterly Individual Learning Agreements,
- Review of annual Progress Reports,
- Annual analysis of Benchmark Portfolios and development.

*Charter Sponsor/OCPS, Donors, the Winter Garden Community, and others* will gain information about the school's progress through:

- Annual formal reports
- Annual school-based and web-based presentations and explanations of school-wide data,
- Periodic newspaper reports on school progress

8. Describe, to the extent possible, how student progress and performance will be evaluated and compared to closely comparable student populations.

*WOMCS will evaluate student progress and performance and compare data with comparable student populations by researching the results of other Montessori and non-Montessori charter and non-charter schools to gather relevant instructional information.* The FCAT school-wide results will provide the norm-referenced data for state and national comparison within similar groups of students. Montessori assessments, as criterion-referenced evaluation, measure student outcomes with the Montessori curriculum at a certain level in the program. WOMCS will comply with all FL DOE and OCPS recommendations and requirements for student achievement and test data analysis. Our goal will be to use assessment/testing results for school-wide program improvement. It will be interesting to compare Montessori achievement levels to other programs and populations, and to see achievement results across comparable student populations.

## **E. Exceptional Students**

1. Describe how the school will comply with state and federal requirements for serving students with disabilities, including the procedures that will be utilized for identifying students with special needs, developing Individual Education Plans and providing a full range of services.

*WOMCS will readily comply with all applicable state and federal requirements for serving students with disabilities.* WOMCS will adhere to all applicable provision of Federal law relating to the education of students with disabilities, including the Individuals with Disabilities Education Act; section 504 of the Rehabilitation Act of 1974; and Title II of the Americans with Disabilities Act of 1990.

ESE Staffing Specialists will meet at least once annually with teachers, specialists, parents and the student when appropriate, to plan, revise, and update IEP implementation and accommodations, always consistent with what is best developmentally for the student. If need be, an ESE Specialist will consult monthly with the child's teachers, and other professional specialists to closely monitor each exceptional education student, RTI, and update accommodations as necessary. Montessori is an inclusionary learning environment, and every attempt will be made to keep exceptional children with their multi-age learning group.

*WOMCS accepts students who fall into Exceptional Student Education (ESE) programs as long as the student can be served within an inclusion setting.* Any applicant who requires full-time ESE services will be referred to the school district. It is incumbent upon the applying parent/guardian to furnish the school with an accurate, complete, and current copy of the student's IEP. Providing insufficient or false information of a child's legally required ESE services may be grounds for rejection of the student's admission to the school.

Montessori teachers are specifically trained in observation-based assessment. They use one-to-one assessment to identify students' strengths and areas of weakness. If a student is not progressing academically or is presenting a behavioral difficulty, a Child-Study Team will be assembled to determine what steps are needed to ensure that the student attains his/her academic goals. This team will be made up of, but not limited to, the student's classroom teacher, an ESE Specialist, and other staff as necessary. After a period of studying the student's learning behaviors and routines, a formal evaluation may be done, and recommendations made to design an IEP that supports student improvement. The school's per diem or part-time ESE Specialist is responsible for tracking, reviewing, and progress reports for all IEP's.

2. Identify the staffing plan for the school's special education program, including the number and qualifications of staff.

*WOMCS will work with the OCPS ESE Department to identify staffing needs as a new school, and hire one certified ESE specialist.* WOMCS will compile a current list of professional specialists, such as Speech Pathologists, and ESE Certified Teachers available for consultation in our area, and follow any ESE guidelines suggested to the school by OCPS. WOMCS will hire one part-time state certified ESE Specialist based upon the number of enrolled ESE students at school, and will reevaluate staffing needs as the school grows. WOMCS will comply with all state and federal laws pertaining to applicable ESE services.

At WOMCS, the ESE coordinator/instructor will function according to an inclusion model, providing extra assistance in the classroom to children with Individual Education Plans (IEPs). There will be ongoing consultation between the ESE specialist and the classroom teachers.

In accordance with state and federal regulations, our inclusion program ensures students the right to a free and appropriate education within the least restrictive environment. WOMCS will have an IEP team for each ESE student, consisting of the ESE specialist, the classroom teacher, the parent, and other appropriate staff when necessary.

In addition, WOMCS will obtain contracted services by a school psychologist, occupational therapist, physical therapist, and speech and language therapists as needed.

3. Describe how the school will serve gifted and talented students.

*The Montessori Educational Program by design serves children of all learning abilities in an inclusive, multi-age and multi-ability learning environment.* Children in Montessori classrooms move ahead in the curriculum at their own individual pace, and are not required to wait for others to proceed in their academic studies. Gifted and talented children thrive in Montessori Classrooms, quite often working a grade level or two above their peers. Individualized, differentiated instruction and monitoring of student progress, as in ESE, creates an effective and developmentally appropriate educational approach for the gifted and talented child. The Montessori teacher monitors the progress of the gifted student, and continues to inspire achievement by knowing when to open new educational opportunities for the individual student. Gifted children consistently prove their academic, emotional and social needs are thoroughly met within the Montessori program.

4. Describe how the school will evaluate the effectiveness in serving exceptional students.

*WOMCS, in compliance with all state and federal laws, will work closely with the certified ESE specialist on our team to assess, evaluate, and determine the effectiveness of the program as well as accommodations for ESE students.* In Montessori, daily observation of the child, his behaviors and attitudes, as well as the work he produces provides the teacher with accurate and immediate feedback on how well the program is working for him. Effectiveness of instruction for learning disabled, as well as gifted students at WOMCS will be evaluated through embedded, frequent observation and portfolio submissions of student work, and comparison of student work within the framework of the WOMCS Montessori Assessment Handbooks. More formal SAT10 baselines in the Fall, and Spring FCAT assessments will measure and evaluate ESE student progress through the Montessori program. The school will work closely with OCPS ESE specialists to determine accommodations, effectiveness, and evaluation of ESE program for individual students.

**F. English Language Learners (ELL)**

1. Describe how the school will comply with state and federal requirements for serving ELL students, including the procedures that will be utilized for developing and maintaining LEP plans and providing services.

*WOMCS, in compliance with all applicable state and federal laws, will provide a strong, supportive, and inclusive environment for students with limited English proficiency.* WOMCS will adhere to all applicable provisions of Federal law relating to students who are limited English proficient, including Title VI of the Civil Rights Act of 1964 and the Equal Educational Opportunities Act of 1974.

Students who enroll at WOMCS and report a home language other than English on his/her Home Language Survey, will be formally assessed by an OCPS ELL Specialist, in order to determine their ability to perform ordinary academic work in English. Based upon this evaluation, an LEP will be developed and implemented, with regular evaluations of the instructional plan and student monitoring and progress in program goals and English language proficiency. WOMCS will make appropriate curriculum modifications, providing intensive one-on-one or small group English reading, oral communication, and writing instruction and/or provide supports for understanding content-based instruction in the higher grades.

“Basic ESOL includes instruction in speaking, listening, reading, and writing English in an instructional program appropriate to the proficiency level and academic potential of the students.” The ELL Specialist, as necessary, will facilitate communications between home and school.



2. Identify the staffing plan for the school to meet the needs of the ELL students, including the number and qualifications of staff.

*WOMCS will hire a part-time certified ELL specialist to consult and oversee ELL students based upon all state and federal requirements for serving ELL. Initially WOMCS will hire a part-time ELL specialist who will work with instructional staff in designing and implementing a learning plan, and with individual students based upon evaluation of need. WOMCS will comply with all relevant ELL rules and regulations. Number of ELL specialists depends on the number of enrolled ELL students. Qualifications for this position are dictated by FL DOE.*

## **G. School Climate and Discipline**

1. Describe the school's daily schedule and annual calendar, including the annual number of days and hours of instructional time.

*Montessori schools are intended to be close-knit communities of people living and learning together in an atmosphere of warmth, safety, kindness, and mutual respect. Teachers become mentors and trusted guides. Students learn to appreciate and value the different backgrounds and interests of their classmates, creating a culture of trust, sharing and discovery. WOMCS will follow the annual OCPS School Calendar 180 day schedule.*

### **WOMCS- SCHOOL HOURS:**

#### **Monday, Tuesday, Thursday and Friday**

**8:05-8:30am- Student Arrival**

**Students should not be at school before 8:05 each morning as there is no adult supervision before that time.**

**If students need to be at school before 8:00am please stop in the main office for information about our before school and after school program.**

**Student Hours begin 8:30 am**

**Dismissal beginning 2:50 pm until 3:15 PM**

#### **EARLY RELEASE DAY – Wednesday**

**8:05-8:30am- Student Arrival**

**Student Hours begin 8:30 am**

**Dismissal beginning 1:50 pm - 2:10 PM (5.5-6 instructional hrs)**

**Faculty Planning Time- 2:00-3:00pm**

**Faculty Meeting - Wednesdays 3:00 – 4:00pm**

**PLEASE REFER TO DAILY SCHEDULE CHARTS FOR BOTH ELEMENTARY AND MIDDLE SCHOOL.**

## 2. Describe the school's philosophy regarding student behavior.

*The Montessori learning environment is structured in such a way as to eliminate many of the typical discipline issues found in other classrooms.* In the first days of school each year, the students and teachers develop a set of ground rules to guide the group. If additional issues arise, the class as a community establishes a reasonable solution so that they will be able to learn from the situation. The consequences for not following the ground rules and not accepting responsibility will depend upon the severity of the infraction and will follow a hierarchy of consequences laid out in the code of conduct, including parent intervention, and removal from classroom. The students' freedom to explore and think for themselves is balanced with their responsibility to work and learn respectfully within the class community. The autonomy to manage time and make choices, allows the student opportunity to acquire a sense of ownership for their growth and achievement. Students willingly accept responsibility for setting goals and completing assignments, as well as for being contributing members of the class group. The Montessori classroom culture promotes an atmosphere of order, calm, and civility that is quite remarkable to an onlooker used to traditional classrooms. This unique class culture helps free the teachers from constant disciplining and it allows students to concentrate on their work. The guiding expectations for students' behavior at school include:

- *Respect:* Students will be respectful of themselves, other students and teachers, each other's work, their classroom environment and materials, as well as respecting the greater environment that we all share. When respect is the norm, a calm and peaceful atmosphere results.
- *Purposeful Activity:* Students are expected to choose appropriate, challenging work and to be engaged in their studies. Positive attitudes toward work and motivation to learn are part of the school and classroom culture from the first day.
- *Responsibility:* Students will take an active role in their own education. They will participate in creating their individual learning contracts and weekly work plans. Students will learn to contribute to the functioning, maintenance and management of their own classroom environment, taking the initiative to care for learning materials, belongings, and other items in the classroom. Students will be expected to contribute their energy, ideas and time to the larger community through service work.

*In the Middle School, integrity and responsibility will be heavily emphasized.* Students will be expected to keep their word and to pull their weight in collaborative projects. In cases where they step out of bounds through verbal or physical abuse, cooperative discipline results. Students take an active role in analyzing their own behavior and are encouraged to learn from their mistakes.

*WOMCS Code of Conduct reflects the priority to ensure that students are physically and emotionally safe while at school.* Therefore we will develop a zero tolerance policy with respect to infringements on this safety, with suspension or expulsion in cases of weapons, violent behavior, drugs, and harassment, for example. The policy will make distinctions between intentional, harmful behaviors, and those rooted in an inability or developing ability for self-control. This will include provisions for special needs students, as required by law, to determine whether the student's misconduct is related to the student's special needs, or results from an inappropriate special education/placement or an IEP that was not fully implemented. Discipline and Dismissal procedures will follow those found in the OCPS Code of Student Conduct.

#### 4. Code of Student Conduct (See above also)

*A full Code of Conduct for WOMCS will detail infringements to physical and emotional safety at school, consider persistent behavioral issues that infringe on the rights of other learners, and the resulting consequences. The policy will be written by a team of parents and staff in the planning year before opening, and will be targeted for adoption by the school community in the late summer of 2011. Current and prospective families will be expected to read and sign a copy of this policy to indicate understanding, acceptance and support.*

*The secondary purpose of the WOMCS Code of Conduct will be to uphold the Montessori values of grace, courtesy, respect and responsibility. The policy will support these values by recognizing that conflicts and problems are a natural part of a school environment, and by detailing clear channels for communication and problem solving. An explicit policy will reduce the likelihood of recurring problems that result from either not knowing how to address a problem, or feeling there are no effective avenues for addressing an issue. In each classroom, students and teachers will also develop and agree to a core set of rights, responsibilities, and consequences, (for example, "I have a right to be heard when I am speaking. I have the responsibility to listen when others are speaking. I understand I will need to spend some time away from the group's discussion and decisions if I cannot manage my responsibilities."). This core set of rights, responsibilities, and consequences will serve to help students articulate and apply WOMCS's core values.*

*Discipline and dismissal procedures at WOMCS will follow those in the OCPS Code of Student Conduct and Consistency Manual listed below.*

- If a charter school student is withdrawn or is expelled from the charter school and has committed an expellable act that would merit full exclusion, the student will be denied enrollment to any Orange County public school or program.
- If a charter school student is expelled and has committed an expellable act that would merit exclusion from a comprehensive (regular) school, the student may be accepted in an alternative OCPS program.
- If a charter school student withdraws but has not committed an expellable act based on OCPS standards, the student shall be admitted to an OCPS program and the charter school shall rebate the FTE to the district.

## II. ORGANIZATIONAL PLAN

### A. Governance

1. Describe how the school will be governed, including documentation of legal structure (i.e. Certificate of Incorporation).

*A. West Orange Montessori Charter School is incorporated and governed by a Board of Directors responsible for upholding the mission of the school and ensuring that the school is faithful to its charter. WOMCS is a Non-profit, 501c3 corporation controlled by a self-perpetuating Board of Directors. Board members may be community members or located nationally to acquire highly qualified individuals with Montessori experience. The Board will hire and evaluate the Executive Director-Principal who oversees the daily operations of the school in much the same way a CEO oversees a business.*

A separate foundation called, "The Children's Montessori Foundation" will be established to financially supplement West Orange Montessori Charter School's ongoing operations, growth and fulfillment of the mission to make Montessori education accessible to families.

The Children's Montessori Foundation Mission Statement: "The Children's Montessori Foundation is a 501(c) 3 non-profit organization with the mission to provide, promote, and support high quality, authentic Montessori public education for K-8<sup>th</sup> grade children in Orange County, Florida."

The foundation's purpose is to provide financial leadership to WOCMS, and to be a financial conduit through which necessary funds are granted, and designated by the Executive Director and the Board of Directors to fulfill and successfully accomplish the mission of West Orange Charter Montessori School.

2. Provide an organizational chart for the school and a narrative description of the chart. Clearly describe the proposed reporting structure to the governing board and the relationship of the board to the school's leader and administration.

#### See Organizational Flow Chart

*A. The Board of Directors will work closely the Executive Director to ensure that the school adheres to its mission, values, and its charter.* The Executive Director will serve as a non-voting ex officio member of the Board of Directors, attending all meetings and reporting to the Board.

#### Outline of Board Responsibilities:

1. Establishes policies and procedures that provide for the effective operation of an authentic Montessori K-8 Public School.
2. Recognizes, respects and preserves the executive, administrative, and leadership role of the Executive Director-Head of School.
3. Ensures full compliance with all applicable Local, State, and Federal laws, standards and regulations as they pertain to West Orange Montessori Charter School.

#### In carrying out these duties, the responsibilities of the Board fall into three general categories:

- Programs
- Finances
- Evaluation

#### Program Responsibilities of the Board:

- Set and oversee general operational policies.
- Select, hire and evaluate the Head of School, or Executive Director. The Board delegates to the Head full responsibility for administrative functions and refrains from interference in program operations.
- Approve long-range plans and set annual strategic goals.
- Maintain visibility in the school. Board members should occasionally serve in classrooms and frequently participate in school functions.
- Refer to the Executive Director requests for specific program review or new program development.
- Provide advice, at the request of the Executive Director, regarding sensitive administrative matters.
- Establish clear communication channels and a grievance process. Serve as a source of final appeal only when a decision cannot be resolved through administrative channels.

Financial Responsibilities of the Board: (3 categories)

- Asset Management:
  1. Determine policies for the use of resources
  2. Set investment policy and monitor investment performance
  3. Maintain stewardship of buildings and grounds- construction, renovation, and maintenance.
- Budget:
  1. Approve an annual budget
  2. Determine and approve employee benefit policies, staff size, and total compensation for staff.
  3. Periodically review budget, monitoring cash flow and ensuring adequate funding for programs.
- Fundraising:
  1. Oversee funds development and set goals for major fundraising endeavors.
  2. In consultation with head of school, determine priorities for use of all funds raised, in line with the annual strategic goals.
  3. Set an example by making individual donations to the school.
  4. Actively solicit donors in all major fund drives.

Evaluation Responsibilities of Board:

1. Conduct an annual evaluation of the Executive Director, using specific standards and goals mutually developed by the Board and the head of school.
2. Evaluate the overall program of the school in light of annual strategic goals and mission.
3. Conduct an annual self-evaluation, examining the organization and functioning of the Board of Directors. Review bylaws and amend as necessary for improved and effective operation.
4. Participate in an annual Board Retreat to reflect upon WOMCS mission, review evaluations, and develop a new set of strategic goals. This combines program and evaluation responsibilities.

*The Board of Directors will be composed of at least 7 to 13 members plus the Executive Director. The composition of the Board will be representative of the school's constituents, however faculty, staff, and students will not serve on the Board.*

Characteristics of a Board Member:

- Is strongly convicted of the mission of the school, and committed to contribute to its success.
- Is teachable regarding Montessori education, and will be a strong spokesperson for the school in the community.
- Has specific professional experience or expertise in at least one relevant area: Montessori education, finance, construction, law, public relations, fundraising, and public education.
- Devotes time to preparation, planning, and meetings and action.
- Focuses on the long-range implications of decisions.

*Officers of the Board of Directors: The Board of Directors is self-managing and organizes itself to effectively fulfill its responsibilities. Leadership is a key element in the Board's organization. WOMCS bylaws specify duties and selection process. For continuity and program implementation stability, the Board Officers will be elected and serve three consecutive years.*

- President- The President is both the administrative leader of the Board and a partner /consultant with the Executive Director. Requires a major time commitment, strong communication skills, discernment, and the ability to maintain confidentiality. Chairs all Board Meetings and Executive

#### Committee Meetings.

- Treasurer- The Treasurer provides information and leadership to assist the Board in its responsibility for the financial health of WOMCS. Chairs the Finance Committee Meetings, meets monthly with CPA and/or Executive Director to review activity and reports. Prepares brief financial summary reports of school finances for each Board Meeting. Provides consultation for annual budget, and works with the CPA and head to arrange the annual audit.
- Secretary- The Secretary will facilitate all preparation for Board Meetings and document the work of the Board. Takes minutes at each Board Meeting and provides and distributes a written copy to each Board member within one week following the meeting. Distributes reports, agendas, and other materials prior to the Board Meeting to allow members adequate preparation time. Maintains the official record of all Board Minutes. Annually compiles a summary of all Board decisions during the year. Summaries are distributed to all Board members and included in the Official Record. Keeps the school's seal, used for legal documents.

#### WOMCS Board Committees:

1. Executive Committee- Officers and Executive Director; President of the Board chairs. Chief function is to plan for the work of the Board by developing agendas and guidelines for Board actions. Plans orientation of new Board members, annual retreat, and annual Board evaluation. Has the authority to make decisions in emergency situations when there is inadequate time to call a full Board Meeting. Limitations in bylaws.
2. Finance Committee- Treasurer chairs; includes members with finance expertise and experience. Reviews and recommends financial policies and procedures; oversees the development of the annual budget in close collaboration with Executive Director and CPA. Oversees financial operations, working with head of school, providing Board with periodic reports and reviews, and annual audit. Oversees the school's investments and recommends specific investment strategies to Board.
3. Building and Grounds Committee- Oversees the physical assets of WOMCS: property, buildings, and major equipment. Ensures that property is maintained and renovated to meet program needs. Members monitor the safety of the schools' physical environment, as well as conformity with all regulatory requirements, such as fire, health and building safety codes. Makes recommendations for capital improvements. Reviews and oversees construction plans and works closely with Finance Committee and Funds Development Committee to plan for capital expenditures.
4. Funds Development Committee- Oversees all fundraising efforts for WOMCS. Sets policies for receiving gifts and conducting fundraising. In consultation with the Executive Director, it recommends to the Board annual priorities for use of funds according to the mission and strategic plans. Approves all fundraising events and may appoint *ad hoc* committees to plan and implement specific fundraising events. Members take an active role in cultivating and soliciting major donors and train the Board members in the art of donor solicitation.
5. Public/Parent Relations Committee- This committee works to broaden the community's involvement with WOMCS. Primarily to coordinate volunteer efforts in support of the mission and program of the school. Reviews major publications to ensure that they are consistent with the mission and image of WOMCS. Occasionally recommends communication or marketing approaches to disseminate information about WOMCS and its Montessori program and to further develop public and parent relations and awareness.

During the first two years of operation, the Board of Directors shall meet monthly to review the actual budget and address school issues as they arise. In addition, Board Meetings will be open to the public, dates/times are communicated via website, school bulletin board postings, and handouts. Time will be designated for members of the public to address the Board. Board members will participate in school-based presentations, and forums, attending school events and fundraisers, and visiting the school on a regular basis. The Governing Board of Directors will work constructively to support the Executive

Director in the fulfillment of the program on a daily basis. The goal is that the relationship between the Board of Directors and the Executive Director is based upon Montessori values and is mutually congruent, responsive, symbiotic and respectful. The Organizational Flow Chart communicates reporting and grievance avenues of resolution. It will be communicated as often as necessary that grievances should always be taken to the immediate individual involved, after that, if not resolved, taken to the next individual up on the flow chart, until a peaceful, satisfying resolution can be found.

*B. The Executive Director or Head of School is responsible for managing all operations of WOMCS. The integrity of administration is maintained through clear delineation of the respective roles of the Board of Directors and the Executive Director, and good communication between the two.*

Outline of Executive Director Responsibilities: (Please see Job Description for Executive Director)

1. Provides Professional Leadership for WOMCS. Articulates the school mission for all constituents- families, students, staff and community. Visible and accessible to members of the WOMCS community. Attends all Board Meetings, Board Retreats, prepares regular reports to Board on school operations and program development. Guides the Board in developing long-range and strategic plans. Provides for Board's ongoing Montessori orientation. Works with staff to develop programs in accordance with WOMCS mission and works with faculty to create relevant professional development programs. Plays an active role in soliciting donations in all major fundraising drives.
2. Administrates/Manages all WOMCS Operations According to Policies Set by Board of Directors.  
Responsible for all selection, hiring, supervision, and dismissal of all staff. Provide an ongoing, relevant, engaging professional development program. Administer the operating budget and be held accountable to the Board for effective business management. Develop specific operational goals and objectives to implement the strategic goals mutually established with Board. Prepare annual budget recommendations, including recommendations for additions or changes in personnel, facilities, and programs. Oversees all enrollment, progress, and assessment of students in meeting State of Florida Next Generation Standards and fulfilling the Goals and Objectives of the academic program. In consultation with faculty, make final decisions regarding disciplinary action or dismissal of students.
3. Evaluate all Operations of WOMCS. Executive Director conducts annual evaluations of all staff, oversees and supervises all formal student evaluation and assessment, ensuring that parents receive written results. Review operations to ensure compliance with all regulatory and accrediting bodies. Schedules outside consultation as needed. Provides leadership for ongoing Montessori program growth, evaluation, including curriculum standards and curriculum development. Oversees development of the school culture and environmental tone on daily basis.

*C. Board of Directors and Executive Director Relations.* The following are guidelines for policies addressing Board-Executive Director relationship.

- Any time faculty members communicate with the Board regarding the school's program, the Executive Director should be present. Otherwise the Executive Director is at risk of faculty circumvention or Board preemption of the head's authority. It is best for the head to represent the faculty in dealings with the Board. The Board chair stresses Board-Head confidentiality; any Board member approached by a faculty member redirects the faculty member to the head of school, which is the Executive Director.
- Through committees or individuals, the Board refrains from dictating procedures for office management, staff hiring, faculty relations, program details, building and grounds

maintenance, etc. If Board members need to involve staff in tasks, they should first consult with the head. Montessori schools have program balance that Montessorians understand best. The Board will leave program evaluation to the Executive Director, always protecting the autonomy of WOMCS' program and the privacy of the teachers.

- Parent Grievances: Board members will be reminded that they are not to handle parent grievances before being first handled by the Executive Director. Board members shall refer all parent complaints to the Executive Director first, and if a complaint is not resolved, follow established grievance procedure.

3. Provide a description of the responsibilities and obligations of the governing board as a whole, individual members, and officers of the board.

*The Board of Directors will work closely the Executive Director to ensure that the school adheres to its mission, values, and its charter. The Executive Director will serve as a non-voting ex officio member of the Board of Directors, attending all meetings and reporting to the Board.*

**\*Please refer to WOMCS corporation by-laws**

Outline of Board Responsibilities:

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4. Conduct an annual self-evaluation, examining the organization and functioning of the Board of Directors. Review bylaws and amend as necessary for improved and effective operation.
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Public/Parent Relations Committee- This committee works to broaden the community's involvement with WOMCS. Primarily to coordinate volunteer efforts in support of the mission and program of the school. Reviews major publications to ensure that they are consistent with the mission and image of WOMCS. Occasionally recommends communication or marketing approaches to disseminate information about WOMCS and its Montessori program and to further develop public and parent relations/awareness.

*The Governing Board, as a whole, provides a ballast of sound judgment, responsiveness and reason regarding*

*school-wide issues.*

**Outline of Board Responsibilities:**

- Establishes policies and procedures that provide for the effective operation of an authentic Montessori K-8 Public School.
- Recognizes and preserves the executive, administrative, and leadership role of the Executive Director-Head of School.
- Ensures full compliance with all applicable Local, State, and Federal laws, standards and regulations as they pertain to West Orange Montessori Charter School.

4. Describe the policies and procedures by which the governing board will operate, including powers and duties; board member selection, removal procedures and term limits; code of ethics, conflict of interest, and meeting schedule.

*Charter school governing boards must be guided by a set of by-laws that define how the board will operate.*

**Please refer to WOMCS By-laws for detail.**

*The Board of Directors provides West Orange Montessori Charter School a ballast of sound judgment, responsiveness and reason regarding school-wide issues. The Board is guided by the by-laws included in this charter application.*

**Outline of Board Responsibilities:**

1. Establishes policies and procedures that provide for the effective operation of an authentic Montessori K-8 Public School.
2. Recognizes and preserves the executive, administrative, and leadership role of the Executive Director-Head of School.
3. Ensures full compliance with all applicable Local, State, and Federal laws, standards and regulations as they pertain

*Applicants may include their proposed by-laws.*

**WOMCS By-laws included**

5. Explain how the founding group for the school intends to transition to a governing board.

*WOMCS has a self-appointed Founding Board who will either appoint themselves, and or invite other qualified individuals to participate on the Governing Board of Directors through an election process.*

*Following official Charter School Approval and notification, there will be a Founding Board Meeting to determine members, vote, and ratify decisions concerning the transition to Governing Board.*

6. Describe the plans for board member recruitment and development, including the orientation process for new members and ongoing professional development.

**Please refer to by-laws.**

*WOMCS will communicate to the school community, in school handbooks, local newspapers and on the school's web site openings for service on the WOMCS Board of Directors. Orientation will take place over the first few months, and include a Board annual retreat, formal and informal Board training workshops, and individual mentoring. New Board of Directors members will attend approved governance training within 90 days of appointment, with refresher training scheduled for every three years for board members. Board members will attend recommend Montessori educational philosophy workshops and events as determined beneficial for the safeguarding and promotion of the mission of WOMCS.*

7. List each of the proposed members of the school's governing board, indicating any ex-officio members and vacant seats to be filled. For each proposed member, provide a brief description of the person's background that highlights the contribution he/she intends to make through service as a governing board member and any office of the board that individual holds.

*The members of the initial West Orange Montessori Charter School Founding Board of Directors are:*

1. Thomas Palmer, 404 Mary Ellen Court, Winter Garden
2. Jeffrey Badgely, 827 Irma Avenue, Orlando, Florida 32803
3. Ex-Officio member: Michelle Dulany, 227 South Main Street, Winter Garden, Florida 34787
4. Anya Kaleshefski, 13630 1<sup>st</sup> Avenue, Winter Garden
5. Michelle Wood, 1422 Sherbourne Street, Winter Garden
6. Dr. Mary-Catherine Segota, 13350 W. Colonial Dr., Suite 340, Winter Garden, FL 34787
7. Beth Palmer, 404 Mary Ellen Court, Winter Garden

*WOMCS initial Founding Board of Directors Officers:*

1. President: Thomas Palmer
2. Vice President: Jeffrey S. Badgely, Attorney
3. Secretary: Michelle Wood
4. Treasurer: Mary-Catherine Segota
5. Ex-Officio Member / School Executive Director: Michelle Dulany
6. Education Member, Anya Kaleshefski
7. Parent Member: Beth Palmer

*Please See Attached Board Member Resumes and Brief Statement of Commitment Letters*

*Thom and his wife, Beth Palmer are the proud parents of two young children who are quickly approaching elementary school age. The Palmers are committed to the Montessori Educational approach and to the opportunity of public school choice. They have been instrumental in leading our founding board in monthly meetings, providing valuable wisdom and insight. Thom has extensive education and experience in construction management, and Beth is a State of Florida Licensed Clinical Social Worker. Together they offer facilities know-how and student services connections, as well as being long-term members of the Winter Garden community.*

*Jeffrey Badgely is an Attorney here in the Orlando area, as well as a committed Montessori parent of 4 young children. Jeff and his wife Charlotte are active parent members at the West Orange Montessori preschool where their two young boys attend, and have consistently demonstrated their commitment to their children's education. Since last February, Jeff has donated his time and legal skills to West Orange Montessori Charter School by professionally drafting and filing our Articles of Incorporation, Bylaws and Non-profit, 501c3 status application documents. Jeff is enthusiastic and willing to continue to guide our efforts in creating a sustainable public Montessori school for the children in our community.*

*Michelle Wood is an accomplished Management and Labor Operations expert at Disney Resorts, and with her husband the proud parent of a young son who attends Montessori preschool, and exceeded speech pathologists' expectations. Michelle has committed her time, management skills and good judgment to helping to provide a community Montessori Charter school, and will continue to help support and guide the project. Michelle lends a fresh eye to topics relating to the project.*

*Mary-Catherine Segota, Psy. D., P.A.* a practicing Licensed Clinical Psychologist and Certified Family Mediator, and a devoted parent to her two young children, one of whom attends the Montessori preschool. Mary-Catherine has the education, professional experience and keen insight necessary to help successfully guide our Montessori Charter school project. She is a fierce proponent of Montessori education and to seeing this innovative educational approach made accessible to local families. Mary-Catherine is looking forward to bringing her energy and wisdom to this enormous task.

*Anya Kaleshefski* is a FL State Certified 6-12 English and K-12 Art Teacher, currently teaching Art in Florida's Virtual School Program. Anya is the energetic single parent of two young children who organized her lean finances to have both of her children attend the Montessori preschool. Her oldest child struggles with dyslexia, but after his early Montessori reading instruction is now reading confidently, at grade level and exceeding expectations. Anya has a diverse, beneficial skill-set and consistently provides help on a variety of levels in this educational project. She brings her public school experience as a classroom teacher, as well as fund-raising and event planning experience to work to make WOMCS a reality.

*Michelle Dulany* is an experienced Montessori School Administrator and Head Teacher, she is also the parent of three grown children and the grandparent of a young Montessori preschool student. Michelle earned her Masters degree in Education, with a concentration in School Administration while raising her young children. A strong visionary and devoted Montessorian, Michelle has worked to research, write and propel this charter application toward approval for the sake of the children she believes deserve this kind of enriched educational experience. Michelle is committed to serving the mission of WOMCS for the long-term. *Please see Resumes & Board Letters in Appendix*

8. Explain how parents and the community will be involved in the governance of the school.

*As a community-based, public Montessori K-8 Program, parents are encouraged to participate in the governance and life of the school.* Parents choose to participate as School Advisory Council, (SAC) members, as Parent-Teacher-Association, (PTA) members, and may serve on the Governing Board of Directors. Parents are encouraged to share their ideas, desires, and voice through service on the board, and in school committees. WOMCS will have an open door policy, whereby parents may speak with the Executive Director about concerns or issues regarding the school. Parents will be encouraged to volunteer their time and talents in classrooms and support classroom life. Our school culture and Montessori values communicate clearly that increasing family involvement in the school is directly associated with increasing student achievement. We believe that authentic parental participation in their child's education matters. We work closely with our parents to achieve the highest levels of student learning. We ask parents to read with their child, and to support a healthy, consistent lifestyle for their developing child. Parents will be increasingly aware of their responsibility in the educational process of their children. Parents will participate in and share their concerns and opinions through a variety of ways, one will be an end of the year parent survey. Our goal is to invite parent participation, to listen thoughtfully to all ideas and concerns, and to partner with parents in creating an excellent educational experience for their children.

*School Advisory Council-* The WOMCS School Advisory Council (SAC) consists of four parents, two teachers and two business members and shall be responsible for approving academic, facilities and general planning decisions. SAC will make well-researched program recommendations and be a resource for the school and the Board of Directors.

The SAC Executive Board will consist of the following.

- SAC Chairperson:
- Recording Secretary and Teacher Representative:
- Academic/Curriculum Committee: (Teacher Representative)
- Facility/Technology Committee:
- Hiring/Staff Committee:
- Business Partnership Committee:
- Fundraising Committee:
- After School Committee:

The WOMCS SAC will make decisions regarding the day to day running of the school and shall include six standing committees that will be responsible for researching and making recommendations to the SAC. Standing committees may include members of the community, parents, students, and school staff.

The committees are:

- 1) Academic/Curriculum Committee;
- 2) Facilities and Computer Technology Committee;
- 3) Hiring/Staff Committee;
- 4) Business Partnership Committee;
- 5) Fundraising Committee,
- 6) After School Program Committee.

Minutes from previous SAC meetings will be available on the WOMCS web site.

*Parent-Teacher-Association*— When a child attends WOMCS, parents become a vital member of our school learning community. This is a school-wide body including all the parents. As a member of our Montessori Charter School community, parents are asked to contribute volunteer hours each academic year to benefit the school. The PTA coordinates and tracks these efforts. The PTA is integral to the child-teacher-parent triangle of supportive learning. Within the PTA energy is focused on activities that support the school's community and achievement. Every parent is eagerly welcomed and appreciated in this parent-lead service to our school community, classroom and facilities support, and fund-raising efforts. A designated contact will communicate between the PTA and the Executive Director to communicate a concern or needs to the Board of Directors.

If the school is filing the application in conjunction with a college, university, museum, educational institution, another nonprofit organization or any other partner, provide the following information:

- Name of the partner organization.
- Name of the contact person at the partner organization and the person's full contact information.
- A description of the nature and purpose of the school's partnership with the organization
- An explanation of how the partner organization will be involved in the governance of the school.

N/A

## B. Management

1. Describe the management structure of the school, including job descriptions for each administrative position and teacher that identify key roles, responsibilities and accountability.

*WOMCS will be managed by an on-sight Executive Director, acting as the program's Principal, guiding the daily operations of the school, with accountability to the governing Board of Directors. The Executive Director will hire an Executive Assistant/Secretary who will function both as a School Secretary and an Assistant to the Director. Staff will be added as the school grows and in accordance with the mission and budget of the school.*

### **Job Description: Executive Director/Head of School**

Reports to: The President of the Board of Directors

Supervises: All faculty and staff, both teaching and non-teaching

Position is: Year-round

The Executive Director or Head of School is the chief operating officer appointed by the Board of Directors to administrate the implementation of the school's mission and operating policy. He/she is an educational director who provides the day-to-day educational leadership for the school. The Head carries out the school's broad educational mission and policies as established by the Board of Directors.

Specifically, the Head of School is responsible for:

#### *Relationship with the Board*

- Brings to the attention of the President of the Board such matters and data about the needs and operation of the School as are appropriate to keep the Board fully informed to meet its responsibilities.
- Serves as the chief communicator between the Board of Directors and the faculty / staff.

#### *Organization*

- Creates an appropriate and strong management team for the School. The Head is expected to share and delegate to his or her immediate subordinates such that they will be prepared to collectively lead the School should the Headmaster suddenly become incapacitated.
- Promotes an internal organization that permits effective communication - up and down.
- Works to produce smooth day-to-day internal operations.

#### *Planning and Analysis*

- Develops with the faculty and staff tactical plans for the School. Also participates with the Board of Directors in strategic planning.
- Encourages perspective via assessments, comparisons with similar institutions, and external analyses and critiques.
- Remains abreast of trends and research in education, particularly those affecting public charter school operation and educational leadership.

### *Programs*

- Designs, implements and administers student programs and services, appropriate to the needs of those enrolled and consistent with the values and teaching styles of a progressive humanistic Montessori approach, and develops systems of scheduling to accommodate these programs and services.

- Sets standards of participation and achievement in each of the following areas:

- Academic:

Assures that the curricular scope and sequence, as well as instructional strategies, reflect the school's progressive Montessori philosophy and goals. Plans, implements and evaluates all school-wide formal assessment programs and procedures. Provides leadership for improved teaching and learning, and student achievement. Responsible for meeting all Program Goals and Objectives.

Provides leadership in the process of curriculum development.

Provides assistance and support to the staff in their efforts to develop curricula that reflect the school's progressive, Montessori philosophy and goals.

- Co-curricular: Plans and organizes activities, elective offerings of a para-academic nature, formal cultural exposures, and athletics sufficient to round out the school's academic program and provide for student interest development.

- Character development: Implements formal and informal programs that relate to high moral and ethical conduct. This includes counseling and advisory programs, a system of positive discipline that promotes kindness and courtesy, and a mechanism for coordinated psychological assistance in the event of student need.

- Student life: Establishes and oversees school culture. Oversees programs for after hours and weekends, including extended day programs and recreational and cultural activities.

### *Personnel*

- Defines the teaching and non-teaching professional faculty positions needed to implement the School's program, and recruits highly effective teachers and staff to fill them.

- Establishes productive working conditions, discipline, training and development of all professional staff.

- Assures that staff understand, and share the School's Montessori philosophy and goals.

- Determines standards and takes appropriate steps to measure and maintain reasonable performance and professional growth among immediate subordinates and, through them, all professional employees; dismisses those who fail to meet the standards.

- Establishes practices and procedures to promote harmonious and constructive relationships among all of the School's professional staff. Consciously works to establish an atmosphere of team building, planning and ownership. Follows a collegial managerial style rather than authoritarian leadership style.

- Maintains personal contact with all School staff members, fostering good public relations, promoting high morale, and identifying personnel problems as early as possible. Encourages similar conduct among subordinates.



### *Program and Service Support*

- Works with the staff to identify curriculum needs in terms of teaching materials, faculty, and program support.
- Holds general program responsibility for the safety and well being of all of the School's students.
- Approves and administers rules and procedures governing the student body.
- Works to promote harmonious relationships between students, faculty, parents and administrators, recognizing the importance of developing each individual.
- Oversees the evaluation of student progress and systems for communicating with parents. Works with the faculty to develop and implement procedures for tracking student status and progress and for intervening early when concerns are identified. Meets with the faculty weekly to discuss student progress, concerns, and program goals.
- Strives to create and maintain an aesthetically attractive school environment that is compatible with Montessori values of peace and respect.

### *Finance*

- Prepares a complete annual budget proposal for submission to the Board of Directors with the assistance of the Board's Finance Committee and school CPA.
- Upon annual budget approval by the Board, the Head ensures that the available financial resources are carefully managed within the budgetary guidelines.
- Is responsible for the preparation of monthly financial statements to the Board on various matters concerning the School's financial health, including enrollment, outstanding accounts, revenue changes, expenditures, and cash flow projections.

### *Enrollment*

- Plans, and supervises all enrollment policies and procedures as outlined in the charter contract, and implements programs to achieve them.
- Works with the Board of Directors and faculty to establish and administer standards and procedures for Student Code of Conduct.

### *Constituent Relations*

- Encourages meaningful alumni, parent, and past parent participation in events that aid and support the goals of the school.
- Responds to special interest groups, giving them direction while stressing the needs of all students.

### *Institutional Image*

- Interprets and communicates the mission of WOMCS and its programs to the public and strives to personify

the school.

- Serves as a primary spokesperson for the school.

#### *Fund Raising*

- Participates actively in planning for all fund raising efforts
- Actively supports and encourages the school's fund raising efforts
- Assists in the fund raising effort by articulating in many different settings the school's unique vision and the value of the goals for which funds are being raised.

#### **Job Description: Curriculum and Assessment Coordinator** *(Please Note: The Executive Director will fill this future position for years 1-4)*

Reports directly to the Executive Director and is responsible for the school in his/her absence.

This is a 12 month administrative position and is an integral part of a strong educational team, helping to provide forward-looking leadership for an exemplary public Montessori K-8 program.

#### **Responsible for:**

The Curriculum & Assessment Coordinator is responsible for creating and maintaining the integrity and quality of the Montessori scope and sequence from Kindergarten through Middle School; as well as being responsible for all planning, implementation, and supervision of formal assessments school-wide, which includes FCAT, SAT10 and FAIR testing.

To this end the Curriculum & Assessment Coordinator works with the Executive Director in designing and implementing a vibrant Professional Development Program for Instructional Staff, as well as supporting the Executive Director in sustaining and nourishing a skilled, experienced faculty in their work with children, parents, curriculum, and colleagues.

The Coordinator is adept at maximizing the organization, coordination and communication between many people to assure individual student achievement through the Montessori educational program, and provides the training and guidance necessary for both teachers and students in preparation for achievement testing. The Coordinator is instrumental in designing Benchmark Portfolio requirements, Assessment Tools and Teacher Handbooks, and to revise and improve upon as needed.

The Curriculum & Assessment Coordinator is an accomplished Montessori, and possibly public school educator, a "teacher's teacher" holding Montessori Certification at both the Primary (3-6) and Elementary (6-12) levels. Knowledge of the Montessori Middle School scope and sequence is important. Knowledge of educational evaluation and current assessment methods; an understanding of various learning styles; experience in the classroom teaching, with assessment and testing; parent-teacher conferencing, leading staff development workshops, and the passion and commitment for motivating academic improvement. A Masters degree in Education or Psychology is required.

#### **Job Description: Executive Assistant/Secretary**

Reports: directly to the Executive Director

12 Month Position

Responsible for supporting the function of the Executive Director in the daily operations of the school. The EA fulfills all duties and responsibilities of a school secretary, while maintaining a first contact with the public regarding the school, an office "first-contact" for students, parents and teachers. The Executive Assistant is well-educated and has either Montessori Certification or has attended the required trainings set forth by the Executive Director so as to be adequately prepared to speak about the Montessori programs offered by WOMCS.

The EA has extensive computer, organizational and excellent communication skills, as well as the ability to work well with a team of educators. This individual will be experienced in understanding children and their development, he/she will have a sense of humor and be energetic, have a varied skill-set and be focused on providing support in the fulfillment of the school's mission.

**Job Description: Lead Teachers, Teachers**

Reports: Executive Director and Curriculum & Assessment Coordinator; provides lead direction to assigned assistants/interns.

This instructional position plans, organizes, and provides learning experiences for students in a Montessori environment. Lead teachers understand and promote the mission of the school, its purposes, objectives and policies to parents and other staff in a positive, supportive manner.

**Essential Job Functions:**

1. Develops lesson plans and manages the learning experiences for students to ensure the needs of the groups and individual students are met.
2. Assists students toward self-directed learning and high academic, personal and social achievement.
3. Maintains a neat, well organized, and attractive prepared environment consistent with Montessori pedagogy.
4. Participates in professional activities designated by the principal, which may include workshops, curriculum development, retreats, meetings, grade reporting, planning, and other professional pursuits.
5. Attends all pre-announced staff meetings and professional sessions, including staff, department, committee and, evening parent meetings.
6. Works to develop close and effective relationships with parents, including opportunities to discuss and understand the child's individual progress; encourages them to bond with both the class, and the larger school community; provides individualized tracking of student progress.
7. Participates in the admissions process, speaking from time to time with prospective families, conducting new student assessments--at the request of the principal.
8. Follows the school's policies and procedures for student evaluation, assessment and record keeping, and meeting all due dates as required; includes the administration of standardized tests.
9. Assesses the needs of the class and prepares requests for materials, furnishings, and supplies within the framework of the budgeting process; updates inventory list and submits to principal on last day of school.
10. Plans and participates in class field trips, acting in a supervisory capacity.
11. Performs related duties as assigned, such as playground supervision, arrival and dismissal duty.

2. Outline the criteria and process that will be used to select the school's leader and the process by which the school leader will be evaluated.

*In the future the Board of Directors will be responsible for working with the School Advisory Council to recruit, select and hire an appropriate WOMCS Montessori educational leader. WOMCS will maintain, as criteria for selecting future school leaders, its Montessori philosophy and mission through effective, highly educated and qualified, experienced Montessori School Leaders who are motivated by a passion to serve children and families in this unique capacity. These potential candidates will demonstrate strong school-building skills, both administrative and as a responsive educational leader in service to teachers and students. All State of Florida educational hiring policies, such as mandated background checks and fingerprinting, reference and credential checks, and other professional hiring procedures shall be followed. The WOMCS Governing Board will have the final authority to select, hire, evaluate, and dismiss the Executive Director or Head of School.*

3. Provide a staffing plan for each year of the charter term.

**WOMCS Staffing Plan for Academic Years 1 - 7**  
**(Follows Projected Enrollment)**

**Year 1 – 2 Lower EL (1-3 Grade) Classes**

<u>Kindergarten-18: 1</u>	<u>Lower EL (6-9)</u>	<u>Lower EL (6-9)</u>
	Grade 1-18	Grade 1- 18
	Grade 2- 18	Grade 2-18
	Grade 3- 0	Grade 3- 0
	<u>36-Student</u>	<u>36</u>
	2- Teachers/1 Assist	2- Teachers/1 Assist

90 Students- Year 1 – 5 Teachers: 1 Primary Teacher; 4 Lower EL Teachers; 2 Assist.

**Year 2 – 2 Lower EL Classes-Add: 3<sup>rd</sup> Grade**

<u>K- 18</u>	<u>Lower EL (6-9)</u>	<u>Lower EL (6-9)</u>
18:1	Grade 1-18 (9+9 new)	Grade 1- 18(9+9 new)
	Grade 2- 18	Grade 2- 18
	Grade 3- 18	Grade 3- 18
	54	54
	3-Teachers/1 Assist.	3-Teachers/1

126 Students- Year 2 – 7 Teachers: 1 Primary; 6 Lower EL Teachers + 2 Assist.

**Year 3 - 2 Lower EL Classes-Add: 2 Upper EL (4-6<sup>th</sup> Grade) Classes-4<sup>th</sup> Grade**

K- 18  
18:1

Lower EL (6-9)  
Grade 1- 18 (9+9 new)  
Grade 2- 18  
Grade 3- 18  
54: 3/1

Lower EL (6-9)  
Grade 1- 18 (9+9new)  
Grade 2- 18  
Grade 3- 18  
54: 3/1

Upper EL (9-12)  
Grade 4- 18  
Grade 5- 0  
Grade 6- 0  
18: 1-Teacher

Upper EL (9-12)  
Grade 4- 18  
Grade 5- 0  
Grade 6- 0  
18: 1-Teacher  
1-Shared Assist

**162 Students- Year 3 – 9-Teachers: 1 Primary; 6 Lower EL; 2 Upper EL + 3-Assistants**

**Year 4 – 2 Lower EL Classes; 2 Upper EL Classes+5<sup>th</sup>Grade**

K- 18  
18:1  
(9+9new)

Lower EL (6-9)  
Grade 1- 18(9+9new)  
Grade 2- 18  
Grade 3- 18  
54: 3/1

Lower EL (6-9)  
Grade 1- 18(9+9new)  
Grade 2- 18  
Grade 3- 18  
54: 3/1

Upper EL (9-12)  
Grade 4- 18  
Grade 5- 18  
Grade 6- 0  
36: 2 1-Shared Assist

Upper EL (9-12)  
Grade 4- 18  
Grade 5- 18  
Grade 6- 0  
36: 2

**198 Students- Year 4 – 11 Teachers: 1 Primary; 6 Lower EL; 4 Upper EL + 3 Assistants**

**Year 5 – 2 Lower EL (6-9) Classes; 2 Upper EL(9-12) Classes; Add: 6<sup>th</sup> Grade**

K-18  
18:1

Lower EL (6-9)  
Grade 1- 18  
Grade 2- 18  
Grade 3- 18  
54: 3/1

Lower EL (6-9)  
Grade 1- 18  
Grade 2- 18  
Grade 3- 18  
54: 3/1

Upper EL (9-12)  
Grade 4- 18  
Grade 5- 18  
Grade 6- 18  
54: 3/1

Upper EL (9-12)  
Grade 4- 18  
Grade 5- 18  
Grade 6- 18  
54: 3/1

**234 Students- Year 5 – 13 Teachers: 1 Primary; 6 Lower EL; 6 Upper EL + 4 Assistants**

**Year 6 - 2 Lower EL Classes; 2 Upper EL as above, Add: 2-Middle: 7th Grade**

K-18  
18:1

Lower EL- 54: 3/1  
Grade 1- 18  
Grade 2- 18  
Grade 3- 18

Lower EL- 54: 3/1  
Grade 1- 18  
Grade 2- 18  
Grade 3- 18

Upper EL- 54: 3/1  
Grade 4- 18  
Grade 5- 18  
Grade 6- 18

Upper EL- 54: 3/1  
Grade 4- 18  
Grade 5-18  
Grade 6-18

Middle 7-8th

Grade 7- 18 (+4 new)= 22  
22: 1/1

Middle 7-8th

Grade 7- 18 (+4 new)= 22  
22: 1/1

**278 Students- Year 6 – 15 Teachers: 1 Primary; 6 LE; 6 UE; 2 Middle + 6 Assistants**

**Year 7 – 2 Lower EL Classes; 2 Upper EL; 2 Middle (7<sup>th</sup>&8<sup>th</sup>)**

K-18  
18: 1

Lower EL- 54  
54: 3/1

Lower EL- 54  
54: 3/1

Middle -1  
Gr 7- 22  
Gr 8- 22  
44: 2 /1

Upper EL- 54  
54: 3/1

Upper EL- 54  
54: 3/1

Middle -2  
Gr 7- 22  
Gr 8- 22  
44: 2 /1

**322 Students- Year 7 – 17 Teachers: 1 Primary; 6 LE; 6 UE; 4 Middle+ 6 Assistants**

*Staffing Plan includes the Executive Secretary, Part-Time ESE specialist, and retaining consultants, such as  
Speech Pathologist*

4. Explain the school's plan for recruitment, selection, development and evaluation of staff.

**"The child is truly a miraculous being, and this should be felt deeply by the educator."  
-Dr. Maria Montessori**

*WOMCS will seek highly educated, and qualified educational professionals from position postings on national Montessori web sites, such as American Montessori Society and the Association of Montessori International. Montessori educators who possess the character and sense of vision shared by members of the WOMCS community will be highly sought after.*

*WOMCS will advertise locally, for example in the Orlando Sentinel to attract State Certified Instructional staff seeking to further their own professional development by teaching in our Montessori K-8 program. Many traditional public educators will share our mission and desire Montessori Teacher training to work with us. We will attract quality teachers by offering competitive OCPS salaries and the Florida Retirement program, as well as an appealing benefits package, and the opportunity to participate in developing innovative Montessori Assessment Handbooks, and a public Montessori K-8 program that will benefit the community.*

*The WOMCS Executive Director will select, screen, conduct all interviews of teaching candidates; hire, evaluate and if necessary, dismiss teachers or instructional staff.*

Teachers will report to the Executive Director. The Executive Director will identify, train, and guide those individuals who exhibit leadership abilities to take on the responsibility to serve as Lead Teachers in the classroom.

*Development and Evaluation of all teaching staff will be the responsibility of the Executive Director and the Curriculum & Assessment Coordinator. Professional Development will reflect Montessori values and be individualized, and focused upon building a world-class public Montessori School. It is assumed that some teachers will be working to complete Montessori Teacher Program Certificates or State of Florida Teaching requirements, as both certifications are required by WOMCS. A thoughtful Staff Development Handbook will be crafted with teachers to reflect Montessori values and program goals as well as state academic achievement goals and requirements.*

During our planning year we will work collaboratively to create a comprehensive Staff-Faculty Handbook and Parent Handbook for West Orange Montessori Charter School. Professional development will be both individualized and group, focusing on maximizing the individual teacher's strengths, collaborative team teaching, and giving our K-8 teachers the school climate in which to grow as excellent teachers.

*We prioritize our teachers and believe that treating teachers professionally matters. Our teachers are our professional partners and we work to unleash the talents our teachers bring to the experience. Our teachers are committed to children, instructional innovators and problem-solvers. Our 5 year goal is that all of our teachers have laptops and business cards. WOMCS teachers are given the time, and resources to plan effectively and collaboratively. Our teachers drive our continuous improvement and Montessori academic culture.*

*The Executive Director will supervise formal and informal Teacher Evaluations. The motivation for teacher evaluation is to maintain an energetic, teachable, talented teaching staff. The Executive Director will conduct frequent, unannounced visits to classrooms, 3-4 times per week throughout the academic year. Written evaluations will take place each spring, and include a section for the teacher to self-evaluate, followed by the Director's comments regarding performance.*

*WOMCS will have a School Psychologist and a School Social Worker on retainer.*

### **C. Education Service Providers**

If the school intends to enter into a contract with an Education Service Provider<sup>1</sup>:

1. Describe the services to be provided by the ESP. **N/A**

## D. Employment

1. Explain the school's compensation plan, including whether staff will be publicly or privately employed.

*In an effort to attract and retain high quality teaching and support staff, WOMCS will offer competitive compensation parallel with OCPS instructional salary schedule, and will be established as a public employer to fully participate in the Florida Retirement System. During the planning year the board will research creating an appealing employee benefits package or a cafeteria-style selection of benefits options for staff to choose from. Contracts: Contracts will be renewed and issued each year; effective for the period of July 1<sup>st</sup> through June 30<sup>th</sup>. WOMCS will make every effort to bring diversity to its school staff. WOMCS does not discriminate against race, creed, ethnicity, gender, or lifestyle in its hiring and employment policies.*

*Please see appendix for a copy of the 2009-2010 OCPS Instructional Salary Schedule.*

2. Describe the personnel policies and procedures to which staff will be required to adhere, including expectations for participation in the school's professional development program.

*The Executive Director will work during the planning year on a comprehensive, mission-based Staff Policy & Procedures Handbook, which will include all personnel policies and procedures for employment at WOMCS, including expectations for participation in the school's Professional Development Plan. Due to the extensive nature of writing comprehensive staff policy and procedures, we have included the Table of Contents for review. All Handbooks will be written and completed during the planning year preceding opening year.*

*The Staff Policy & Procedures Handbook -Table of Contents:*

### I. General Information:

- WOMCS Mission & History
- Program Goals & Objectives
- Chain of Command/Organizational Flow Chart
- Job Descriptions: Brief; outline duties/expectations
- Enrollment Process: Lottery
- Initial Student Screening; Baseline Testing Procedures
- FCAT procedures
- Current School & Staff Calendar
- Instructional Staff Roster; Support Staff Roster
- Board of Directors Roster
- List of Board Committees & responsibilities

### II. Legal Protections:

- Confidentiality of Staff and Student records
- Sexual harassment policy
- Child abuse reporting
- HIV/AIDS policies/procedures
- Materials ownership policy



### III. Health & Safety:

- Accident/Illness reports & procedures
- Safety procedures: Fire Drills, Eye Protection, Release of Children, Disaster plan, Building Security, Bodily fluids, Hurricane procedures
- Field Trips: Procedures, rules & regulations
- Playground Safety/Duty: Supervision rules.
- Handling / Dispensing Medications
- *Future: Clinic policies & procedures*

### IV. Academic Practices:

- Classroom Environment Guidelines/Standards
- Student referral procedures
- Assessment/Testing procedures
- End-of Year procedures & checklist

### V. Parent & Student Relations:

- Discipline policy/Code of Conduct; Guidelines for Classroom
- Guidelines for Parent Communication/Conferences
- Guidelines for Conflict Resolution
- Homework Policy
- Record Keeping & Student Evaluation: Informal and Formal

### VI. Hiring & Employment Policies:

- Non-Discrimination Policy- Equal Opportunity Employer
- Employment Requirements: Education, Certifications, Citizenship/Visa, Background check/Fingerprinting, Reference checks, Orientation
- Hiring procedure, Teacher Contracts, pay scale, pay period, pay deductions, outside employment policy contract renewal, staff participation/attendance.
- Code of Ethics
- Personnel records
- Overtime, Leave and Time off: vacation, holidays, sick days, professional leave, family leave, leave of absence.
- Benefits: Health, dental, vision, Florida Retirement System, Professional Development
- Faculty Evaluation Procedure
- Teacher Grievance Procedures
- Termination Policy: Resignation, Layoff, Discharge
- Employee Responsibilities or Standards: Performance, Conduct, Attendance
- Faculty Children
- Drug/alcohol policy
- Personal Phone Calls/Cell phone policy

### VII. Administrative Matters:

- Faculty Dress Code
- Work or supply orders/reimbursements
- Inclement weather procedures/notification
- Parking Procedures/policies

3. Describe the standards to be used in the hiring process of teachers, administrators and other school staff and how you will ensure that teachers and administrators are appropriately certified?

*WOMCS will follow generally accepted professional standards for hiring instructional staff, including all State and Local requirements for background checks, fingerprinting and verifying references and previous work experiences and educational degrees and certification.* WOMCS will verify all State Teachers Certifications through the Florida DOE. Teachers employed by or under contract to WOMCS shall be certified as required by Chapter 231, Florida Statutes, and as provided by State, Board of Education rule 6A. 10502 for charter school governing boards. WOMCS may employ or contract with skilled selected non-certified personnel to provide instructional services or to assist instructional staff members as educational paraprofessionals in the manner as defined in Chapter 231, FL Statutes. WOMCS will not employ an individual to provide instructional services or to serve as paraprofessional if the individual's certification or licensure as an educator is suspended or revoked by this or any other state. The school shall not employ any person who has been terminated or non-renewed for performance reasons by the Sponsor. WOMCS shall disclose to parents the qualifications of all teachers according to S.228.056(12)(f), FL Statutes. Parents will be apprised of the qualifications of all new staff hiring through a formal presentation of vitae at the monthly Board of Directors Meetings, monthly SAC meetings and via e-newsletter posted regularly on the school web site.

All employees of WOMCS will be fingerprinted as provided in 5.231.02, FL Statutes with submission to FDLE, and subject to drug testing as determined by the school. WOMCS shall file a complete set of fingerprints, taken by an authorized law enforcement official, for all instructional and non-instructional personnel who are hired to fill positions having contact with students.

The school will establish these hiring standards and procedures, and document them in the WOMCS Staff Handbook. All teachers will review and agree to the school policies written therein. WOMCS seeks to employ individuals who exhibit excellence of character, educational background and previous teaching experience. The Executive Director is responsible for all faculty and staff selection, hiring, professional development, and dismissal if necessary, with recommendations from the Board.

4. What is the targeted staff size, staffing plan, and projected student-to-teacher ratio?

**WOMCS Target Staff Size by academic year 7: 17-20 Professional Teachers and 6 Teaching Assistants organized as follows:**

- **WOMCS Teacher / Student ratio: (K-3) 1:18, (4-6<sup>th</sup>) 1:18, (7<sup>th</sup>- 8<sup>th</sup>) 1:22**
  1. 1- Montessori Primary / Kindergarten Teacher;
  2. 6- Montessori Lower Elementary (6-9) Teachers;
  3. 6- Montessori Upper Elementary (9-12) Teachers; and
  4. 4- Middle School Teachers, two with a Humanities/Literature focus, and two with a Math/Science focus. The staff will include either full or part-time classroom Assistants, some of which will be Montessori Teacher Interns. The staffing plan will follow WOMCS enrollment projections listed below. Staff also includes the Executive Director, Executive Assistant/Secretary, and a Part-Time ESE Specialist. Other staffing needs will be assessed after enrollment.

**90 Students/ Year 1 – 5 Teachers: 1 Primary Teacher; 4 Lower EL Teachers; 2 Assist.**

126 Students/ Year 2 – 7 Teachers: 1 Primary; 6 Lower EL Teachers + 2 Assist.

162 Students/ Year 3 – 9-Teachers: 1 Primary; 6 Lower EL; 2 Upper EL + 3-Assist.

198 Students/ Year 4 – 11 Teachers: 1 Primary; 6 Lower EL; 4 Upper EL + 3 Assist.

234 Students/ Year 5 – 13 Teachers: 1 Primary; 6 Lower EL; 6 Upper EL + 4 Assist.

278 Students/ Year 6 – 15 Teachers: 1 Primary; 6 LE; 6 UE; 2 Middle + 6 Assist.

322 Students/ Year 7 – 17 Teachers: 1 Primary; 6 LE; 6 UE; 4 Middle+ 6 Assist.

## E. Parent and Community Support and Partnerships

### 1. Describe how the school will involve parents in its operations.

- Input, comment, and/or participation in the school's operations or governance
- Lines of communication between the school's governing board or management team and parents

*As a community-based Montessori K-8 Program, parents are needed and encouraged to participate in the governance and life of the school.* Parents are an essential part of fulfilling the school's mission, and are encouraged to participate as School Advisory Council members, as PTA members, parent coordinators for different events, and to serve on the Board of Directors. Parents are encouraged to partner with us and to share their ideas, desires, and voice through service on SAC, the Board, PTA and on various school committees. Teachers and the Executive Director at WOMCS will have an "open door policy" to encourage safe and productive communication routes for parents and students. WOMCS is committed to creating a school culture where it is safe to address difficult issues and where professional staff demonstrates their commitment to stay in conversation and work toward solutions with others. The official grievance policy will be explained throughout the school year, with a chain of command, illustrated on the Flow Chart of who to communicate with in the event of a conflict. Communication from parents to the Board will follow the Organizational Flow Chart, never by-passing the Executive Director.

*A Parent Satisfaction Survey will be developed and distributed on an annual basis, available in both English and Spanish.* WOMCS will have a process in place to encourage a maximum return of the survey. A sub-committee of the SAC will analyze the survey data and the Executive Director will create a report, and will with the approval of the SAC sub committee, present this report to the Board. After review and acceptance of the report by the Board, it will be made available to the public through the school's web site and newsletter. The survey results will be used to create and refine school goals for continued improvement. WOMCS may conduct parent-teacher forums to discuss issues brought forth by the survey. This will provide opportunities to learn together about areas of concern and brainstorm possible solutions.

Parents are expected to volunteer their time and talents in classrooms and support classroom life through their participation. Our school culture and Montessori values communicate clearly that increasing family involvement in the school is directly associated with increasing student achievement. We believe that authentic parental participation in their child's education matters. We work closely with our parents to achieve the highest levels of student learning. We ask parents to read with their child on a daily basis, and to support a healthy lifestyle, including good nutrition for their developing child. Parents will increase their understanding and awareness of their responsibility in the educational process of their children.

*WOMCS seeks to inform and include the broader community in the life of our school.* Our students will be active in community-service activities, both in and outside of school. Going outside of the classroom to experience first-hand the workings of the real world in a larger community, is a focus of the Montessori Elementary and Middle School programs. Students will participate in projects that serve others in the community, such as younger children, the elderly or in community projects that benefit all of us, such as cleaning up a park or painting a recreation building. One of the goals is to spark the spirit of service in the student so that he is motivated to extend these community projects past school inspired events to his own personal life. So that he will seek to serve others because it is right and it provides him with personal satisfaction.

## 2. Describe any community partnerships

*WOMCS is committed to forming productive partnerships with varied and diverse individuals, organizations and businesses serving the Winter Garden-Windermere area.* WOMCS has recently partnered with Oakland Nature Preserve to provide our future students access to an abundance of natural plant and animal habitats from which to cultivate deeper understanding and appreciation through instructional activities. Other partnerships to be established within the first few years of the school's operation include:

- Friends of Lake Apopka- Environmental issues regarding restoring Lake Apopka.
- Winter Garden Rotary- Providing service opportunities
- Roper YMCA- Physical education activities, service opportunities.
- Boys & Girls Clubs
- Winter Garden Recreation Department- Physical education, health, yoga, service opportunities.
- West Orange Times- Local newspaper; supporting writing projects, journalist inquiry; internship opportunities.
- Town Council Members- local political process, experience opportunities
- Museums- history, the arts, sense of community experiences
- Winter Garden Theatre- drama; opportunities in performing arts
- Local Citrus Grove owners- the history and economy of our community; economic geography

## 3. Outline the methods that will be used for resolving disputes between parents and the school.

*WOMCS will communicate school policies and procedures to parents through our Parent Handbook, Back-to-School Events, PTA Meetings, one-on-one enrollment and conferencing opportunities, and our school web site.* All individuals who participate in the life of West Orange Montessori Charter School will understand that disputes

must be resolved first at the level of the offence. If that does not work, the issue is brought to the next person up on the school's organizational chart; this may be a teacher. If resolution is still not found, the dispute is brought before the Executive Director, who brings it to the Governing Board for final resolution. Non-violent, respectful communication between all individuals most effectively reflects our Montessori values. The Organizational Flow Chart, included in both Parent and Staff Handbooks, provides the "chain of command" and will be addressed frequently in parent orientation and educational events. Every effort will be made to keep open lines of communication within the daily culture of the school.

Parents are encouraged to partner with us and to share their ideas, desires, and voice through service on SAC, the Board, and on various school committees. Teachers and the Executive Director at WOMCS will have an "open door policy" to encourage safe and productive communication routes for parents and students. WOMCS is committed to creating a school culture where it is safe to address difficult issues and where professional staff demonstrates their commitment to stay in conversation and work toward solutions with others. The official grievance policy will be explained throughout the school year, with a chain of command, illustrated on the Flow Chart of who to communicate with in the event of a conflict. Communication from parents to the Board will follow the Organizational Flow Chart, never by-passing the Executive Director.

## F. Student Recruitment and Enrollment

1. Describe the plan for recruiting students, including strategies for reaching the school's targeted populations and those that might otherwise not have easy access to information on available educational options.

*In addition to established routes of communicating with the public via local newspapers, such as the Orlando Sentinel and the West Orange Times, WOMCS will conduct monthly Montessori Informational Sessions for area families interested in gaining a better understanding of this innovative, hands-on educational program. In an effort to attract students from diverse socio-economic community areas, we will hold monthly Montessori Info Sessions at various public venues such as in libraries, churches and parks, as well as the possible WOMCS facility location when secured. These events will be outlined in easy to understand language and publicized through flyers and posters in both English and Spanish, and will be hand-distributed, as well as posted throughout targeted neighborhoods by our parent committee members. Orlando-area Montessori Primary (3-6) Schools, of which there are about 28, will be contacted by our Founding Board and committee members to distribute Montessori Charter School information to their school families, providing information of the new elementary Montessori school choice option. We will also physically canvas specific low-income neighborhoods within the 2-5 mile radius from the school location that may not have access to internet, community events or read newspapers. WOMCS plans to hold frequent Montessori Open House events after charter approval and securing the charter school site, where teachers will demonstrate the unique hands-on lessons to parents, and answer curriculum and program questions. Our recruitment and enrollment plan is based upon building an inclusive relationship with our surrounding community, working to enhance the learning opportunities for all children. Ongoing efforts will be made to continue to educate the public about the benefits of Montessori Education in the surrounding communities.*

2. Explain how the school will achieve a racial/ethnic balance reflective of the community it serves or with the racial/ethnic range of other local public schools.

*WOMCS will ensure an accurate racial/ethnic balance in our school community by providing adequate educational and enrollment information to our community's diverse populations by canvassing neighborhoods, including low socio-economic neighborhoods, holding information sessions in Spanish as well as English, and speaking at area community events where educational information may be disseminated easily.* WOMCS will provide bus depot locations through targeted low-income neighborhoods to ensure that transportation is not an issue in attending the school. Parent committee volunteers and Board members will canvass targeted neighborhoods, distributing flyers and school information to families. Distribution of WOMCS enrollment and recruitment information to Orange County agencies such as the NAACP and Hispanic organizations, as well as churches, preschools, and neighborhood recreation centers. We want to empower every parent with a child enrolled in WOMCS to help in guiding and creating the school we all envision. We will seek ways to support our families who are economically disadvantaged by helping to make a difference. This assistance will be through free and reduced breakfast and lunches, assistance with uniform purchase and referrals. Our goal is to make Montessori education accessible to more children in order to improve educational achievement in our West Orange locale. WOMCS seeks a well-rounded, diverse school population in which to offer the benefit of a Montessori K-8 education. It is expected that the racial/ethnic make-up of the student population will be reflective of the public school age population in Orange County, Florida.

3. Describe the school's enrollment policies and procedures, including an explanation of the enrollment timeline, criteria and/or any preferences for enrollment, and lottery process.

*West Orange Montessori Charter School seeks to serve families in our local community who are interested in a proven, hands-on learning approach for their K-8 aged children.* WOMCS is nonsectarian and non-discriminatory in its programs, admission policies, employment practices and operation. The school will enroll any eligible student who submits a timely application, unless the school receives a greater number of applications than there are spaces for students, in which case students will be admitted through a random selection process called a lottery. WOMCS will adhere to the antidiscrimination provisions of s. 1000.05.

In order to help explain our educational method to the community and families who may never have heard of Montessori, we will hold regular "What is Montessori?" informational sessions at the public library and other venues. Informational Sessions will eventually be moved to the new school property, where we will provide actual small group and individual tours of the Montessori classrooms for prospective families. Montessori education is most beneficial for children when families are committed to the full K-8 educational program. We will offer regular Parent Education Events to help educate and involve parents, leading to improved educational commitment to Montessori education and the school. In order to establish an excellent, healthy Montessori program according to our mission, we will follow an enrollment growth plan that "front loads" Kindergarten, First, and Second Grades; sequentially adding a grade level as children move through the grades, and offering new student enrollment at each grade level. Please refer to Enrollment Projections for full plan.

WOMCS is an equal access school governed by all applicable laws as stated in the Florida Charter Statutes.

### Non-Discriminatory Policy

West Orange Montessori Charter School is a Florida Charter School that admits students of any race, color, national or ethnic origin and honors all the rights, privileges, programs and activities generally accorded or made available to students at the school. It does not discriminate on the basis of race, color, national or ethnic origin in administration of its educational policies, admissions policies, athletic and other school administered programs.

Under 1002.33(10)(e)5, which says, "*A charter school may limit the enrollment process only to target the following student populations-* Students who meet reasonable academic, artistic, or other eligibility standards established by the charter school and included in the charter school application and charter or, in the case of existing charter schools, standards that are consistent with the school's mission and purpose. Such standards shall be in accordance with current state law and practice in public schools and may not discriminate against otherwise qualified individuals."

**Please Note: Returning Students will not be required to re-apply each academic year nor participate in lottery process.**

1. WOMCS may choose to give enrollment preference to eligible students with previous Montessori school experience, preschool and or elementary, in fulfillment of our Montessori school mission.
2. Students residing in Orange County, and who submit a timely application, unless number of applications exceeds the capacity of our program, class, grade level, or facility. In such cases, all applicants shall have an equal chance of being admitted through the random selection process of a lottery.
3. Students who are siblings of a student enrolled in WOMCS.
4. Students who are the children of a member of the governing board, or an employee of WOMCS.

### **WOMCS Enrollment Procedure:**

Each year from January 15th through February 15th, WOMCS will hold a 30-day open enrollment period. Applications for students entering Kindergarten through 2nd grade will be taken on a first come first served basis until enrollment exceeds capacity. Only if the number of applications exceeds the number of openings will a lottery be held, whereby each application is drawn randomly until capacity is reached. The lottery will occur at the following Monday at 4:30pm. Any student applying to the school for 3rd grade or above will be placed on a waiting list until currently enrolled students have indicated their intentions to return for the following school year. There are a limited number of available spaces in the upper elementary and middle school programs.

Following the close of the open enrollment period or lottery (if required), remaining applications will be placed on a waiting list. Preference will be given to WOMCS currently enrolled students and their siblings, as well as Board and staff children. A donation of \$50.00 is requested to cover common consumable class supplies that must be replenished such as pencils, paper, folders, etc, with remaining balance of this fund to be used to help purchase uniforms for those families who need assistance. Enrolled families will be asked to purchase a short list of school supplies specific to their child's classroom needs. These will be posted on the school's web site during the summer.

If there is an opening in any program during the current school year, a student will only be enrolled upon submission of a completed WOMCS Enrollment packet. Otherwise, if there are no new openings new applicants will be placed on a waiting list. As soon as an opening occurs, the administrative staff will contact the parent/guardian to complete the enrollment process. There is no tuition for admission to charter school programs, but a student must be able to furnish proof of residency in Orange County.

After open enrollment, all applicants will participate in a lottery on the following Monday at 4:30PM. The lottery will determine the order in which applicants will be offered positions at each grade level in the event that one becomes available. Students offered a position will be notified of the deadline to submit all required paperwork including health forms, school physicals and immunization records. Accepted students who do not confirm this acceptance and provide proper documentation within one week of notification or have not made arrangements with administration to do so, shall forfeit their position, which will be offered to the next applicant. Families are responsible for providing working and current contact information should a space become available as well as proper grade assignment. Families are also welcome to contact the school at any time regarding wait list status. Wait list status and wait list order is only valid for the upcoming year from April to April. Wait-listed students will be subject to open enrollment, in April, of the following year in the event that a position does not open up.

Any child shall be eligible for admission into the Kindergarten who is five (5) years of age on or before September 1 of the school year. A student who transfers from another state shall be admitted under the same age requirements as established in the state where he/she was previously enrolled, as long as curriculum requirements have been met and extensive proof of this can be provided. Any admissions decision made will be at the discretion of the WOMCS Administration.

Due to the success of our program, spaces for enrollment occur mainly at the K-2 level. Spaces at other grade levels are only available when currently enrolled students transfer or move.

The statute requires the following documents prior to enrollment and prohibits a school from admitting a student, regardless of grade level, who does not comply with the law. State statutes hold parents or guardians of school-aged children responsible for compliance with the law.

1. Evidence of the child's date of birth in the manner provided by Section 232.03, Florida Statutes to confirm grade assignment; transferring student's birth certificate must correspond and confirm grade assignment;
2. Evidence of a health examination/physical (completed within twelve months prior to school entry or evidence of an appointment to have such exam within 30 days) in accordance with state board of education rule 6a-6.024. New physicals need to be submitted every two years thereafter, to ensure safe participation in the school PE program.
3. An up-to-date Immunization record; Florida Statute 232.032 and 232.0315 requires each child who is entitled admittance to Kindergarten or any other initial entrance into Florida public school to present a certificate of immunization for the prevention of those communicable diseases for which immunization is required;
4. Documentation of residence including lease agreement, mortgage bill, electric bill, letter from landlord verifying current residence in Orange County.

Admission preference is given to students with previous Montessori school experience, than current / hired staff and board members, than to siblings of students currently enrolled at WOMCS during the time of registration. Students enrolled in the WOMCS Kindergarten program are automatically enrolled into the 1-8<sup>th</sup> grade program, and need only to fill out a re-enrollment form in February to reserve space, provided all achievement objectives for that level have been successfully met. No preference is given to foster children. No preference is given to potential students who reside under the same roof as staff, board members or students currently enrolled who are not related family members by law. **Again, students continuously enrolled at WOMCS will not be subject to the lottery process year after year. They will however, be required to confirm continuous enrollment by February 15th.**



*Students whose families can demonstrate financial need are eligible for assistance in the cost of school uniforms.*

4. Explain any student and/or family contracts that will be used as a requisite for initial and continued enrollment in the school. Describe if and how the school will enforce such contracts

*WOMCS will require parents/guardians of enrolled students to read and sign the school's Parent-School Agreement, which addresses Field Trips, Parent Volunteer Hour Requirements, Uniform Policy, and Behavior Policies. Parent agreements, or contracts are a formal means to bring parents into an active, working partnership with the school on behalf of their child. WOMCS is a school of choice and as such parents may choose to find another public school if they are unwilling to agree and comply with our rules and school policies, which are put in place to support and enhance student achievement and learning. Please see Appendix for a copy of WOMCS Parent-School Agreement*

#### **G. Evidence of Support:**

1. Try to convey as clearly and concretely as possible the scope of community backing for the proposed charter school and its founding board. Document this community support among teachers, parents, students, community members, institutional leaders, and others, through the use of letters of support, surveys, or other tangible means.

*The creation of this Montessori Charter K-8 School is the brainchild of a local parent-educator led coalition to offer a public Montessori K-8<sup>th</sup> grade educational option in the West Orange County area. WOMCS is receiving enthusiastic support of our Montessori K-8 Program in the form of Letters of Support from parents, distinguished community leaders, business owners, individuals, and from other area charter schools. Please refer to this evidence of support for our Montessori Charter School in the Appendix, found at the end of this application.*

### **III. BUSINESS PLAN**

#### **A. Facilities:**

1. Describe the facilities to be used and their location, size, and layout of space.

*West Orange Montessori Charter School has not officially secured property for a school site to date, but is considering several options, one a former Bed and Breakfast building on 2.3 acres.*

The statute states, "The sponsor may approve a charter for a charter school before the applicant has identified space, equipment, or personnel, if the applicant indicates approval is necessary for it to raise working funds." Charter Approval is necessary before our supporters will give financially to this important educational project.

Currently our Founding Board is coordinating initial fund raising efforts for capital to have available for \$2,500.- \$3,500. monthly, which will incur if a property is secured during the planning year before Fall 2011. The Bed and Breakfast property is historic, suitable and charming, with over 5,000 square feet of useable space for Elementary Montessori classrooms and Administrative offices. The grounds offer students mature landscaping, gardens and outdoor classroom space on a large, buildable 2.3acre lot. Other possible sites located include a former, currently unused town recreation facility building, and several commercial sites, and flex-space properties. WOMCS founding leaders are diligently seeking a school location for students that most reflects an ideal Montessori learning environment, and that is financially feasible. *A school location has not been secured to date.*

2. Provide an estimate of the costs of the anticipated facility needs and describe how such estimates have been derived.

*The following anticipated facility lease amounts are based upon the previous working experience of the Charter Applicant as a private School Administrator, and the advice of the contracted CPA.*

Conservatively projected in the school budget, the lease costs for a space with room for elementary classrooms, offices, and property to house the program is estimated and included in the budget projections. We have not secured a school site to date, but estimates are based on current market value for one of the potential school sites. If an alternative site is chosen, the estimated lease costs could be lower than outlined below. Any remaining balance would be placed in a separate savings or facilities fund for future purchase of property.

**Please see attached Budget for greater detail.**

Year 1- \$8,200.00 (per month x 12)

Year 2- \$8,364.00

Year 3- \$8,700.00

3. Explain the strategy and schedule that will be employed to secure an adequate facility.

*The Founding Board and Executive Director have contracted with a real estate agent to facilitate an informed search for a school site.* The real estate agent has worked extensively with the Charter Applicant in locating and securing other school sites, and has great familiarity with the special requirements of Winter Garden, city manager, zoning regulations, and other aspects involved in a property suitable for the use. Our team has produced timely market analysis data to inform selection decisions, and we have toured different potential properties, each with unique qualities to offer a future school community. The Board and Executive Director will use prior experience and judgment in property selection, keeping the Montessori mission foremost in the decision. Early acquisition of a suitable or ideal school property is not financially beneficial given the current schedule of funding for charter schools. If the potential school site has not been leased or sold by next March-June 2011 to another buyer, when charter school funding begins then we will secure the site at that time. Charter Approval at minimum will be required to secure a suitable school facilities site.

Once secured the proposed school site will undergo a series of inspections in order to demonstrate the safety and compliance with applicable state minimum building codes and fire protection codes. The school shall submit documentation of:

1. Inspection by a local Building Inspector; Use permits if needed from the city.
2. Inspection by local Fire Department
3. Compliance with all other applicable federal and state health and safety laws and regulations.

4. Describe a back-up facilities plan.

*The Founding Board of Directors identified a number of possible temporary school site locations for careful consideration. The Winter Garden area has a vacant Recreational Program building available and approved for use downtown, which would house the school for the first 2-5 years. The Executive Director has approached the City Manager regarding possible use, who agrees to the school use of space. Flex Space lease options, (in abundance here in WG) in commercially zoned areas could work as well as the possibility of leasing space in a YMCA or church facility. The use of portable classrooms could supplement space needs after year three in these situations. The Board is prepared to follow alternate options for a suitable school site, with the knowledge that certain regulatory inspections and code modifications will need to be done before school begins. Finding a location for the school can be pursued in earnest once the finance exists to secure it. Following are possible back-up facilities in the immediate area.*

- Former Winter Garden Fire Station- Recreation Center Building, located at 127 S. Boyd St., WG
- Former Water & Utilities Building, located on the corner of Plant and N. Highland, WG
- Office Space in the Gibbs & Register Building, located at 232 Dillard St., WG
- Small former single family residence /commercial building located at 314 E. Plant St., WG
- Commercial space, located at 855 Trailside Center, Plant St., Suite 200, next to library in WG
- Flex-Commercial space, 2478 sq ft, Apex Center, located at 350 East Crown Point Rd., WG

Describe the plan and methods the school will employ to comply with Florida's constitutional class size requirements.

*"The Quality Education Act" establishes limits on the number of students in core curriculum classes by grade level. Annually, compliance with the Act's standards progressively ratchet up through 2010-11 when full compliance is mandated. All school districts have been notified of how they will be expected to ensure compliance, d as student subscription rates vary from district to district, charter school applicants should consult with their respective district officials regarding how best to design their plan for compliance with the Act.*

*WOMCS has established all projected enrollment numbers to comply from the beginning with Florida's class size requirements as an approved Charter School in Orange County. The initial development of WOMCS enrollment projections and student to teacher ratios were all calculated in compliance with class size requirements. WOMCS will meet all class size requirements by hiring an adequate number of teachers to serve the projected enrollment of students. Please refer to Enrollment Projections and Staffing Plan*

**B. Transportation Services**

1. Discuss the plans for transporting students to and from school. What arrangements, if any, will be made with the local school district, private providers, or with parents?

*WOMCS agrees to provide transportation for the school's students in accordance with the requirements of Florida Statute S.1006.21, by working with the OCPS Transportation Department using the vehicle*

*provided for charter school use, for maintenance and driver training, or by using an approved private transportation company.* WOMCS agrees to ensure that transportation is not a barrier to equal access for all students residing within a reasonable distance of the school, determined to be from 2-5 miles away. Revenue has been budgeted for the purpose of transportation at an estimated \$800. per student, with an estimated 30% student participation, before OCPS transportation reimbursement. Busing will help ensure the enrollment of students from families who otherwise would not be able to attend WOMCS. Many students will be transported to and from school by parents and car-pooling. A school-wide student drop-off and pick-up procedure for parents will be implemented and communicated to all families. Parent car-pooling groups will reduce the number of vehicles traversing the school driveway, help the environment, and will be organized anew each Fall.

The School will provide transportation to and from the School to students who reside within two to five miles from the school, and provide the Sponsor with a firm transportation plan once the students have been selected and before the opening of school. WOMCS will designate an employee to serve as a transportation liaison. This liaison will serve as a contact person to work with the Sponsor on matters regarding transportation.

2. Charter schools are responsible for providing transportation for students residing within a "reasonable distance" of the charter school. How has that reasonable distance been defined in your charter transportation plan? What factors helped form the basis for this distance determination?

*WOMCS will provide transportation to and from the school for students who reside within two to five miles from the school, and provide the Sponsor with a firm transportation plan once the students have been selected and before the opening of school.* The reasonable distance of 2-5 miles was defined by recent applicant inquiries of area public schools, charter schools, DOE Dept. of Transportation office, and a general consensus at OCPS Dept. of Transportation. Students who reside within 2 miles of the school are considered able to walk. Actual student enrollment will dictate transportation depot spot locations within the community.

3. Describe the policies that will help ensure that transportation is not a barrier to equal access for all students.

*WOMCS will provide for transportation of students within 2-5 miles of the school. Car-pooling for those interested, will be arranged by a designated parent committee each Fall.* Our primary goal is to make Montessori education public and accessible to more families who reside within a reasonable distance from the school. As an equal access educational program, West Orange Montessori Charter School seeks to insure that transportation is not a barrier to enrollment. As our school grows we will continue to evaluate all of our transportation options in light of school budget considerations. *West Orange Montessori Charter School does not discriminate on the basis of race, national origin, sex, handicap or marital status.*

4. Describe how the OCPS desegregation plan has been taken into account in the transportation plan.

*WOMCS will organize all student transportation routes in the approved charter transportation plan to reflect compliance with all OCPS desegregation regulations and guidelines.* Our goal is to make Montessori education

public and accessible to many families who reside within a reasonable distance from the school. As an equal access educational program, West Orange Montessori Charter School seeks to insure that transportation is not a barrier to enrollment. The school seeks to meet the transportation needs of its students, and will work with the Transportation Department at OCPS and within our budget to ensure equal access for all. Targeted low-income and neighborhoods will have busing services. *Please see Transportation for more detail.*

### **C. Food Service**

1. Describe the school's plan for food service, including any plans for contracting services.

*WOMCS is currently researching participation options in the NSLP. A nutritional policy for the school will be written with the intention of ensuring that students have sound nutrition as a premise for strong achievement.* Our goal is to identify ways to participate in the NSLP and offer healthy reduced or free student lunches, without implementing a cafeteria and cooking. Due to space constraints, WOMCS will seek options to serve prepared lunch packs of healthy, high protein, low sugar meals from an approved food service vendor in the Orlando area. Knowing that many children enrolled in our program will come from low-economic families, the school seeks to provide free and reduced meals to support focused learning and healthy growth. The lunch program details will be resolved during the upcoming planning year. WOMCS will research the opportunity to purchase prepared lunches from a neighboring public school. The Founding Board continues to research options to successfully meet this need.

### **D. Budget**

1. Describe the financial management and internal accounting procedures of the school.

*The Executive Director has primary daily responsibility for the school's finances, and will be overseen by the Board of Directors.* The Board will meet monthly and review the financial statements and actual results-vs-budget. The Board will approve all purchases over \$5,000 prior to initiating the purchase. The School will also retain the services of a contract CPA to review all financial transactions, to prepare the required District reports on a monthly basis, and to prepare the School for the annual audit.

Cash receipts will be deposited by the Executive Secretary when received, and will be reviewed by the Executive Director upon deposit. All invoices will be approved by the Executive Director, prior to disbursing funds. Checks will be prepared by the Executive Secretary and will be signed by the Executive Director. The salary of, and reimbursements to the Executive Director will be approved by the Chairman of the Board. All other salaries will be approved by the Executive Director and will be reviewed by the Board when developing the annual budgets. Budgets will be prepared and adjusted throughout the fiscal year and will be approved by the Board at the monthly Board meetings.

2. Present a budget for start-up expenses covering only the planning and capital expenses necessary before school opening. **Please See Completed WOMCS Budget Pages**

3. As required by F.S. 1002.33 and school board policy, present an operating budget for the length of the proposed contract covering all projected sources of revenue (both public and private), expenses and anticipated fund balances and planned expenditures. As it pertains to the budget, it is required that the applicant submit a detailed and realistic financial plan and analysis.

This shall include the following: **All Required Items Listed Below Included In WOMCS Budget**

- (i) A sensitivity analysis and financial plan for the first year based on enrollment of 50 percent, 75 percent, and 100 percent of capacity, with contingency plans for reduced enrollment. Documentation commitment included therein of all revenue referred to in the budget.
  - (ii) Five percent of the operating and five percent of the capital budget in a contingency fund.
  - (iii) Cash flow projections displayed month by month for each year of the charter term and a plan to fund any cash flow shortfalls (Sensitivity Plan Sample, p. 13)
  - (iv) Contingency plans to replace any loss of state funds for both operating and capital expenditures **(School Board Policy)**
4. Provide a detailed narrative description of the revenue and expenditure assumptions on which the operating and start-up budget are based.

**Please See Complete Narrative Description in WOMCS Budget**

5. Explain the school's spending priorities.

*WOMCS will prioritize spending in the areas of excellence in instruction, and sustained academic achievement for all of our students.* This means prioritizing attracting, hiring, and compensating the very best educators, and maintaining, updating, and replenishing quality learning materials and classroom environments. School spending priorities will consistently reflect our commitment to fulfilling the mission of WOMCS. Specialists will be added to the staff to enhance efficiency and achievement. Well-respected, inspiring educators/consultants will be brought in for professional development seminars for staff. Innovative science labs will be designed, and outfitted. Art and music studios will be designed and well-stocked, a state of the art science lab, computer and technology labs updated with the best equipment, etc..

The school will offer a percentage of reimbursement to teachers for completed state certification course requirements and Montessori teacher training certification. WOMCS will offer teacher compensation comparable with OCPS based upon current OCPS salary schedules of education and years of experience, and the school will participate in the FL. Retirement Program, a huge incentive for teachers. WOMCS seeks to encourage and support the continuing professional development of each of our K-8 teachers and assistant/interns, providing daily support and creating a school culture that the teachers will enjoy as well as students. Classroom libraries of books, Montessori and other learning materials, as well as computers, etc, will be purchased when timing and finance support additional materials. The school library will be a resource for the entire WOMCS community.

6. Do you plan to conduct any fund-raising efforts to generate capital or to supplement the pupil allocations? If so, briefly explain.

*Efforts are currently underway to gain financial support for WOMCS a non-profit 501c3 educational organization from surrounding communities, organizations and business owners, as well as from individuals. At this initial planning stage WOMCS intends to raise at least \$25K annually to supplement FTE allocations and generate capital. This number may change and will be adjusted to reflect current program needs. The school is prepared to conduct typical annual fund-raising campaigns and events, and will commence these events after charter approval. WOMCS is also working with our board member who is an attorney on establishing a separate organization called, "The Children's Montessori Foundation" to be established within the first three years of the school's operation to raise capital in support of Montessori educational programs in our area.*

*Fund-raising efforts will commence after charter approval final notification.*

7. A revenue estimate **must** be obtained from the Florida Department of Education. Please attach the Florida Education Finance Program Projected Revenue form to the application. This projection is provided to charter applicants from the Florida Department of Education. The contact number for the FTE/Budget office is (850) 488-5142.

**Please See Included Projected Revenue Estimate Sheet, located with the Budget Attachments**

### C. Financial Management and Oversight

1. Describe who will manage the school's finances and how the school will ensure financial resources are properly managed.

*The Executive Director has primary daily responsibility for the school's finances, and will be overseen by the Board of Directors. The Board will meet monthly during the first years of operation, and review the financial statements and actual results-verses-budget. The Board will document in the monthly meeting minutes, a financial review of the budget. Budget amendments, if deemed necessary by the Executive Director will be approved by the Board. The Board will approve all purchases over \$5,000 prior to initiating the purchase. The School will also retain the services of a contract CPA to review all financial transactions, to prepare the required District reports on a monthly basis, and to prepare the School for the annual audit.*

2. Describe the financial controls, including an annual audit and regular board review of financial statements, which will be employed to safeguard finances and projected enrollment trends.

*The Executive Director has primary daily responsibility for the school's finances, and will be overseen by the Board of Directors. The Board will meet monthly and review the financial statements and actual results-vs-budget. The Board will approve all purchases over \$5,000 prior to initiating the purchase. The School will also retain the services of a contract CPA to review all financial transactions, to prepare the required*

*District reports on a monthly basis, and to prepare the School for the annual audit.*

Cash receipts will be deposited by the Executive Secretary when received, and will be reviewed by the Executive Director upon deposit. All invoices will be approved by the Executive Director, prior to disbursing funds. Checks will be prepared by the Executive Secretary and will be signed by the Executive Director. The salary of, and reimbursements to, the Executive Director will be approved by the Chairman of the Board. All other salaries will be approved by the Executive Director and will be reviewed by the Board when developing the annual budgets. Budgets will be prepared and adjusted throughout the fiscal year and will be approved by the Board at the monthly Board meetings.

3. Describe the method by which accounting records will be maintained.

*The accounting records will be kept on both an accrual basis and a modified-accrual basis of accounting to satisfy the reporting requirements set forth by the Florida Department of Education. They will be maintained in the QuickBooks online accounting system with automatic backups of all information entered. Backup for all disbursements and deposits will be kept in locked, fire-safe filing cabinets in the School Administrative offices.*

4. Describe how the school will store student and financial records.

*The Student and Financial Records will be securely kept in locked, fire-safe filing cabinets located in the Administrative offices of the School. The Executive Director and administrative assistant will have access to student files and financial records. The Executive Director oversees the safety and security of all official school records. The following procedure is adapted from Lake Eola Charter School regarding student files.*

- All Cumulative Folders and Permanent Records of students leaving WOMCS to attend the regular OCPS System or another charter school will be forwarded to the receiving school.
- All Cumulative Folders and Permanent Records of students leaving WOMCS to attend a school outside of the regular OCPS System will be copied and forwarded to the receiving school. The original Cumulative Folder and Permanent Record of the student will be filed with the School's Inactive Student Records and transferred to the Sponsor in accordance with Florida Statutes.
- All Cumulative Folders and Permanent Records of students leaving WOMCS for any reason, other than the above, will be filed with the School's Inactive Student Records and transferred to the Sponsor in accordance with Florida Statutes.
- All Inactive Student Records will be forwarded annually to the Sponsor's Dept. of Records, 445 West Amelia St., Orlando FL 32801. These records shall be forwarded each year prior to September 30 for any student withdrawing prior to June 30 of the previous year. WOMCS shall maintain pupil attendance records in the manner of OCPS.
- A report from WOMCS will be forwarded annually to the Sponsor's Dept. of Records, listing all students enrolled during the school year and the disposition of each student's Cumulative Folder and Permanent Record, ie, stored on site, transmitted to Sponsor or other if appropriate. This report shall be forwarded each year prior to July 1, unless subject to change by Sponsor.



5. Describe the insurance coverage the school will obtain, including applicable health, worker's compensation, general liability, property insurance, directors', and officers' liability coverage.

*West Orange Montessori Charter School will carry the required amounts of general liability, property, student insurance, directors and officer's liability coverage per the charter contract. This insurance will be obtained through a reputable insurance provider in central Florida. During the planning year the Board members will work with the Executive Director to acquire and put together comprehensive health insurance in an appealing benefits package for our employees. General liability, property insurance, etc will be purchased from Hillcrest Insurance, Winter Garden, FL., and will be purchased contingent upon charter approval and property acquisition. Estimates for insurance are provided in the projected budget expenditures. The school shall present documentation of insurance to the Sponsor.*

- General Liability
- Property Insurance
- Worker's Compensation/Professional Liability
- Student Insurance

#### G. Other Governance Policy:

The school board expects charter school founders to follow the same guidelines for naming their schools as the Orange County School Board. These guidelines include:

*Names being used only once, whether by a charter or non-charter public school in Orange County.*

**"West Orange Montessori Charter School" the name is in compliance.**

#### H. Action Plan

Present a timetable for the school's start-up.

*It is requested that charter approval be granted by October 1, 2010, in order for the proposed school to develop on the following implementation timetable, and for adequate fund-raising efforts to begin.*

- **July 29 – August 2, 2010.**
  - Submit Charter Application to OCPS Office of School Choice.
  - Attend subsequent hearings through October.
- **October 1-15, 2010**
  - Charter Approval / Charter Contract Negotiations with Sponsor Begin.
  - Property Lease to Purchase Agreement, securing desired school property.
  - Fund raising events at school site begin.
  - Assemble committee members, and other support groups.

- **October – November 2010**
  - Application process for Planning and Implementation Grant / Submit
  - Contact area Montessori Preschool Heads to disseminate info to families re: new K-8 public Montessori School.
  - Continue fund-raising efforts / gather financial backers/ donors
  - Advertize new Montessori Charter School in local newspapers, etc.
  
- **November 2010 – March 2011**
  - Recruit, Select, and Hire Instructional and Office Staff. Background checks, fingerprinting, verifying records/references.
  - Schedule building and fire code inspections / zoning and permitting for use as school.
  - Work on site plan with Kirby Engineering, for parking and traffic-flow patterns. Gain P & Z approval; estimates for site work.
  - Order *Montessori Curriculum Correlation with Next Generation Standards* for K through 3<sup>rd</sup> grade. (\$3,900. per level: order the 6-9 level)
  - Begin working on Montessori-specific Benchmark Portfolio Standards and Assessment Handbook, tools with educational team.
  - Begin compiling Staff Policy & Procedures Handbook and Parent Handbooks, designing a Professional Development Handbook
  - Work with Alarie Design- design and set-up WOMCS web site to disseminate enrollment information online.
  - Begin newspaper ads and neighborhood canvassing for new student enrollment.
  - Begin conducting “Montessori Information Sessions” at various local venues and bi-monthly.
  - Begin classroom learning materials and furniture ordering, based upon finances- partial planning grant acquisition timing.
  
- **January 2011-February 2011**
  - Set-up offices; filing systems; data bases
  - Begin Enrollment for K through 2<sup>nd</sup> grade
  - Continue to oversee above projects through to completion.
  - Meet with Instructional staff for planning and input
  
- **April 2011 – June 2011**
  - Continue enrollment/placement of students
  - Continue to oversee above projects through to completion.
  - Secure any final permits; licenses; etc
  - Painting and general fix-up preparations, including landscaping projects.
  - Order playground equipment and surfacing materials. Design outside areas.
  - Establish how spaces will be used; begin to set up classrooms.
  - Appeal for donated books, order classroom books, computers, etc...
  - Set up all classroom environments K-3
  
- **July 2011 – August 2011**
  - Continue all of the above through completion
  - Final Health and Fire Inspections, etc
  - Last minute meetings, planning sessions, etc..
  - Faculty and staff retreat, professional development workshops
  - Last minute details that crop up before first day.

## V. STATEMENT OF ASSURANCES

This form must be signed by a duly authorized representative of the applicant group and submitted with the application for a charter school.

As the authorized representative of the applicant group, I hereby certify under the penalties of perjury that the information submitted in this application for a charter for \_\_\_\_\_ is true to the best of my knowledge and belief; and further, I certify that, if awarded a charter, the school:

- Will be nonsectarian in its programs, admission policies, employment practices and operations.
- Will enroll any eligible student who submits a timely application, unless the school receives a greater number of applications than there are spaces for students, in which case students will be admitted through a random selection process.
- Will adhere to the antidiscrimination provisions of s. 1000.05.
- Will adhere to all applicable provision of Federal law relating to the education of students with disabilities, including the Individuals with Disabilities Education Act; section 504 of the Rehabilitation Act of 1974; and Title II of the Americans with Disabilities Act of 1990.
- Will adhere to all applicable provisions of Federal law relating to students who are limited English proficient, including Title VI of the Civil Rights Act of 1964 and the Equal Educational Opportunities Act of 1974.
- Will participate in the statewide assessment program created under s. 1003.43.
- Will comply with Florida statutes relating to public records and public meetings, including Chapter 119, Florida Statutes and s. 286.011, Florida Statutes, which are applicable to applicants even prior to being granted a charter.
- Will obtain and keep current all necessary permits, licenses and certifications related to fire, health and safety within the building and on school property.
- Will provide for an annual financial audit in accordance with s. 218.39.

The governing board, at its discretion, allows \_\_\_\_\_ (name), \_\_\_\_\_ (title) to sign as the legal correspondent for the school.

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

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

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

**ADDITIONAL ASSURANCE** Required as a result of recent legislative action:

The signatures below **and** the attached documentation will serve as verification that the applicant, school principal and chief financial officer have participated in the required Florida DOE application training.

**IT IS THE APPLICANT'S RESPONSIBILITY TO ASSURE COMPLIANCE WITH THE STATE OF FLORIDA TRAINING REQUIREMENTS. ATTENDANCE AT ANY OCPS MEETINGS OR TRAININGS WILL NOT BE CONSIDERED COMPLIANCE WITH THE STATE REQUIREMENTS.**

\_\_\_\_\_  
*Applicant's Signature*

\_\_\_\_\_  
*Date of Training*

\_\_\_\_\_  
Applicant's Printed Name

\_\_\_\_\_  
Trainer's Name

\_\_\_\_\_  
*Charter School Principal Signature*

\_\_\_\_\_  
*Date of Training*

\_\_\_\_\_  
Charter School Principal's Printed Name

\_\_\_\_\_  
Trainer's Name

\_\_\_\_\_  
*Chief Financial Officer's Signature*

\_\_\_\_\_  
*Date of Training*

\_\_\_\_\_  
Chief Financial Officer's Printed Name

\_\_\_\_\_  
Trainer's Name

Failure to meet 100% of these assurances will result in the application being deemed incomplete,

# *West Orange Montessori School Charter Application*

## **Appendix**

### **I. Educational Program Exhibits**

- *WOMCS Assessment Schedule Chart*
- *Montessori Approach to Assessment*
- *OCPS School Calendar*
- *2 Samples of Montessori - Next Gen Correlations*
- *Research Documentation-Montessori*

### **II. Organizational Plan Exhibits**

- *Organizational Flow Chart*
- *Articles of Incorporation for WOMCS*
- *Bylaws of WOMCS, Inc.*
- *Founding Board Resumes/Letters*
- *Sample- School / Parent Agreement*
- *Letters of Support / Sample Petition*

### **III. Business Plan Exhibits**

- *Budget Projections:*
  - With Start-Up*
  - Without Start-Up*
  - Sensitivity Analysis*
  - Kindergarten Breakout*
  - Assumptions*
- *FL DOE Training Certificates*

## WOMCS Assessment Schedule

Grade Level	Reading	Writing	Math	Science	Personal Goals	Social Goals
<b>K</b>	Classroom -based Assess. <b>FAIR</b>	Classroom -based Assess.	Classroom -based Assess.	Classroom -based Assess.	Classroom -based Assess.	Classroom -based Assess.
<b>1st</b>	Classroom -based Assess. <b>FAIR</b>	Classroom -based Assess.	Classroom -based Assess.	Classroom -based Assess.	Classroom -based Assess.	Classroom -based Assess.
<b>2nd</b>	Classroom -based Assess. <b>FAIR</b>	Classroom -based Assess	Classroom -based Assess	Classroom -based Assess	Classroom -based Assess	Classroom -based Assess
<b>3rd</b>	Classroom -based Assess <b>FAIR</b> <b>FCAT</b> <i>Benchmark Portfolio</i>	Classroom -based Assess <i>Benchmark Portfolio</i>	Classroom -based Assess <b>FCAT</b> <i>Benchmark Portfolio</i>	Classroom -based Assess <i>Benchmark Portfolio</i>	Classroom -based Assess <i>Benchmark Portfolio</i>	Classroom -based Assess <i>Benchmark Portfolio</i>
<b>4th</b>	Classroom -based Assess <b>SAT10</b> <b>FCAT</b>	Classroom -based Assess <b>FCAT</b>	Classroom -based Assess <b>SAT10</b> <b>FCAT</b>	Classroom -based Assess	Classroom -based Assess	Classroom -based Assess
<b>5th</b>	Classroom -based Assess <b>SAT10</b> <b>FCAT</b>	Classroom -based Assess	Classroom -based Assess <b>SAT10</b> <b>FCAT</b>	Classroom -based Assess <b>FCAT</b>	Classroom -based Assess	Classroom -based Assess
<b>6th</b>	Classroom -based Assess <b>SAT10</b> <b>FCAT</b> <i>Benchmark Portfolio</i>	Classroom -based Assess <i>Benchmark Portfolio</i>	Classroom -based Assess <b>SAT10</b> <b>FCAT</b> <i>Benchmark Portfolio</i>	Classroom -based Assess <i>Benchmark Portfolio</i>	Classroom -based Assess <i>Benchmark Portfolio</i>	Classroom -based Assess <i>Benchmark Portfolio</i>
<b>7th</b>	Classroom -based Assess <b>SAT10</b> <b>FCAT</b>	Classroom -based Assess	Classroom -based Assess <b>SAT10</b> <b>FCAT</b>	Classroom -based Assess	Classroom -based Assess	Classroom -based Assess
<b>8th</b>	Classroom -based Assess <b>SAT10</b> <b>FCAT</b> <i>Benchmark Portfolio</i>	Classroom -based Assess <b>FCAT</b> <i>Benchmark Portfolio</i>	Classroom -based Assess <b>SAT10</b> <b>FCAT</b> <i>Benchmark Portfolio</i>	Classroom -based Assess <b>FCAT</b> <i>Benchmark Portfolio</i>	Classroom -based Assess <i>Benchmark Portfolio</i>	Classroom -based Assess <i>Benchmark Portfolio</i>

# Montessori My School

Visit: <http://montessori.org.au/myschool.htm>

## Montessori Approach to Assessment and Reporting

*With the launch of the My School website there is increased interest in how Montessori Schools compare with traditional schools and particularly how assessment and reporting is handled in Montessori settings. Following is a brief summary of the Montessori approach to assessment and reporting followed by the reflections of a Montessori child, now adult, on how Montessori education compares with traditional schooling and how it prepares children for life.*

### Montessori Approach to Assessment and Reporting

The Montessori approach to assessment and reporting derives from the nature of Montessori philosophy and pedagogy.

It is based on the belief that each child is a competent learner, born ready to learn from the people and the cultural and material environment around them. The Montessori approach facilitates targeted and personalised learning and development experiences for each child, the timing of individualised lessons determined by the detailed observations of each child by the teacher.

Children work in three year age cohorts, in specially prepared environments which contain materials specifically designed to foster the achievement of appropriate developmental milestones, and the sequential mastery of skills and concepts across the range of disciplines. The materials provide feedback to the child and teacher as to where the child is at any time on these developmental milestones and in mastery of skills and concepts. There is a strong emphasis on individual choice and individualised teaching, based on the understanding that children do not achieve those developmental goals, nor master those skills and concepts, in lockstep, but rather need to work at their own pace, benefiting from the opportunities the three year age range provides to learn from and to teach each other, to be inspired by others, and to value helping others.

Montessori education is specifically non-competitive, and eschews rewards and punishment in favour of encouraging the development in children of intrinsic motivation for learning. Activities are open-ended, encouraging exploration and creative thinking, and as such do not lend themselves to grading. Children take ownership of their own progress through their daily work journal, weekly individual conferences with their teacher, by requesting specific lessons as the need arises, and by maintaining portfolios of work completed. These materials, and detailed daily observations of each child by the teacher, form the basis of reporting to parents.

Such reporting is individualised, highly detailed, and focused on the strengths of the child as well as areas where further development is needed. Using an A to E scale or an equivalent 5 point scale is less useful, and certainly less detailed. Nor is comparative reporting, which ranks a student's achievement against the performance of other members of the class, compatible with either Montessori philosophy or practice. Not only is comparative reporting often misleading for parents, and a cause of unwarranted anxiety, it is discouraging for students who score "poorly", detrimental to both their self-esteem and their willingness to persist, as well as potentially negative for those who do "well" by encouraging the valuing of high scores over the inherent satisfaction of learning.

In Montessori multi-aged classrooms, all students are aware of each others' abilities and are comfortable with working at their own pace. The achievements of others are not seen as threatening, but rather as something to which to aspire. Children are able to see that it is normal for individuals to achieve mastery in certain areas at different times and in different ways. As a result, they are encouraged rather than discouraged, and ready to continue to tackle, rather than to avoid, learning challenges.

Moreover, comparative reporting is not achievable in practical terms in Montessori schools, given the three year age cohorts with which we work, and our often small class and school sizes. Comparing children for a particular year within that three year age range will, in most cases, be statistically insignificant as the numbers in each "year" are small (often less than 10) and children within each year are not all learning the same concepts at the same time.

### Reflections on a Montessori Childhood

By Kristin McAlister-Young

When I was asked to write a bit about my experiences growing up in a Montessori school, I initially thought it would be so easy... a quick essay about my schooling. I went to a Montessori school from age 3 to age 12 so I have quite a bit of material to work with. But as I sit to write, I realise what a strange thing it is to be asked to reflect on one's own education. I'm just not quite sure where my schooling ends and where I, as an individual, begin. What is me and the way I approach the world and what is a result of a Montessori upbringing? Would I have been as independent, as curious about life, as passionate about the interconnectedness of the world and its inhabitants if I had not been raised with the Montessori philosophy? I'm not sure. I'd like to think a little of it is just inherent in me, but even so, I question what would have happened to that innate curiosity had I spent my elementary years in a traditional school.

There are many books you can read which will give you an idea of what a Montessori elementary classroom is like. I will not repeat that here, because you would get a more accurate account by reading those books or by talking to children currently in the schools. Rather, I'd like to share my impressions of the Montessori experience as an adult looking back on how it shaped me. What made me most conscious of the wonderful education I had received from my Montessori schooling was when I changed to a traditional school at age twelve. The juxtaposition of the two schools made me aware of the independence, internal discipline, love of learning and critical mind that Montessori had created in me, and it might help the reader understand as well.

This perspective might also be useful to parents in another way since I am often asked by prospective elementary parents if Montessori children will have a hard adjustment when they move to a traditional school. I know parents want to hear that the adjustment is easy. I know that the ability to successfully make that adjustment is taken as reassurance that their children will benefit from the nontraditional education- or at least will not be harmed. I wish I could be reassuring, but, personally, I did not find the adjustment to be easy. Unfortunately I think this is simply the wrong question to ask, because I think the difficulty in adjusting actually illustrates the gift a Montessori education can be for the child experiencing it.

The best way to explain these points is simply to relate some of the challenges I had in making the change from Montessori to a traditional school. The school I moved to was a junior high school with many more children and teachers than my previous school (900 aged 12-15 versus 200 aged 3 to 12). We had individual classes for each subject and each subject was in a different room with a different teacher. The building was enormous to me and quite daunting on the first day. Still, all of that change was actually quite exciting and fun. Montessori children tend to be very adaptable and the newness of the large school was thrilling. I easily made friends and had many adventures. Academically I did well and was involved in many extra curricular activities. When parents ask me if I had a difficult adjustment, they are usually asking about the bigger school, the socialisation, and the academics. By those measures, I had no problems. However, there were a few incidents which illustrate why I think the adjustment was difficult:

During the first test I took, I was sent to the principal's office for "cheating". I had gone to the encyclopedias in the back of the room to look up a question I didn't know.

"Kristin - you cannot use your books to answer the test question. That is cheating!"

"But I don't know the answer."

I didn't have a concept of cheating because it simply made sense to me that if I didn't know something I should look it up and learn it. In terms of my adapting, this experience was more of a funny incident than a real difficulty. I learned easily what was expected of me and adapted, but the difficulty came in understanding the underlying philosophy of the school. I remember being a bit insulted by the whole testing process. Why was it necessary to have to show a teacher what I knew? At my Montessori school the teachers just knew what I knew because we discussed it, they read the reports I wrote, watched the skits that we performed and were inextricably involved in the daily process of learning, discovering, experimenting and researching. We did have tests, but they were either "licensing tests" (tests necessary to prove that we were ready to take on a task of great importance or some danger such as operating a jigsaw in the wood shop) or self-corrected tests whose purpose was to let the individual student understand what he/she knew and what needed more studying. I realised that at this new school the tests were given because they did not trust me to learn.

Similarly, on my first day of school, I got in trouble for talking and also for "wandering" in the classroom. The class had had a lecture during which I sat attentively. My family upbringing and Montessori experience taught me to respect teachers and, in fact, anyone who was talking. I think most Montessori kids would likewise not have a problem with the adjustment to sitting quietly in their seat while a teacher lectured. At the end of the lecture, the teacher gave us questions to answer based on her lecture. When I was finished, I asked her more about one question and her answer was "go sit down- you got it right." I asked her again, trying to clarify that I wanted more information. I don't even remember the subject, but I remember feeling slightly frustrated that she was not listening

to my question. Because I had answered her question correctly, it was as if she didn't need to delve any further into the subject regardless of my interest. When she refused again and told me to stop "wandering and return to my seat to wait", I sat down and spoke to the person next to me about my question. We were both done and I was absolutely perplexed when told by the other student that we were not allowed to talk.

Another time, again in the first week, I got up during a study session and excused myself to the people I was working with to go to the bathroom which was down the hall. The teacher came out of the classroom and grabbed me by the shoulder.

"How dare you leave my classroom without asking permission?"

"I had to go to the bathroom."

"Then you need to ask!"

"To go to the bathroom? Really?"

"You need a hall pass! You can't just walk around the school without a pass!"

These rules were entirely foreign to me. Once I learned them, I followed them easily, but I do remember feeling that insulted that the teacher could take away my right to move around and to talk quietly. I couldn't believe they didn't trust me to go to the bathroom and I couldn't really understand what protection a hall pass gave me- and from what? I immediately felt distrusted and defensive. As soon as I entered the school I could feel the teacher's glares as if we were all animals who had to be corralled into pens and fed information with a carrot and stick. I soon learned to go through enough of the motions to get good grades and keep the teachers quiet. However, this was diametrically opposed to the way I had felt at the Montessori school where active discussion was encouraged and no one would ever be told they did not have the freedom to walk around unless they were disturbing someone else. I know it sounds dramatic, but I remember feeling a great sense of loss. I literally felt my interest in learning slipping away. Although I was socially happy and getting good grades, I lost a great deal of interest in the world around me.

These experiences illustrate the different dynamic between teachers and students in a Montessori setting. Teachers were, if not my friends, at least my mentors. They were a resource I could go to to help find answers, a confidant in dealing with social issues, and the inspiration to push me to new endeavours and challenge new avenues for research. Though they often knew more about a given subject, they were not the keepers of knowledge or the enforcers of learning. They were certainly not the wardens of a prison or the disciplinarians of unruly children. Naturally, there were children who needed disciplining, but by twelve years old, most of us could be trusted not only to follow rules, but in the absence of such rules to determine for ourselves the appropriate conduct in a given situation. Of course there were children that the teachers had to work harder to engage and others that had a more immediate connection with the research. Still, we all loved what we were doing and knew that we were responsible for our own development. The teachers knew this and trusted us. In return we valued, trusted and loved them. Each morning when I entered the Montessori school, it felt like a more exciting version of home- a place where my opinions and my interests were valued, where people pushed me to never accept an answer as the end of a line of questioning, but to use that answer as a spark to a new source of research. I was valued and respected as a member of the learning community; my strengths were celebrated and my weaknesses supported.

There was also a respect for the natural ebb and flow of interest



and motivation. Of course behind the scenes the teachers worked tirelessly to make sure we covered all the bases and they were constantly angling to present material to us in a way that sparked our interest. I know this now, but from our point of view then, we simply felt we were on top of the world, in control of our destinies: pursuing our interests, always looking into new things, new experiences and new ideas and pushing those as far as we could. Often we would have a period of a few weeks where we were involved in a "great work"- a project of deep interest to us. We'd do other things during this time, but the majority of our time was spent pursuing the answers to a question that had grabbed our attention. The teachers worked subtly to make sure that in doing this research we used every available discipline, but to us we were simply immersed in whatever it was that drew our passion. At the end of this period of work (an end which was not imposed by outside forces, but was a natural self-determined ebb of interest, satisfaction with an answer, or pause before tackling a more complex version of the original question) there was usually a period of a few days where we did very little. We'd chat with each other, do some relatively unchallenging work, write stories, do simple math work, or just read. What seemed to be wasted time was one of my favourite memories- not because it was easy, but because it was the counterbalance to those intense times. The teachers accepted these plateaus and respected them. In doing so, I felt that my whole self was respected- the intense passionate one and the one who just wanted to sit and absorb. I did not have to continually prove to the teachers or to anyone that I was a "good student". Rather they supported me in my restful periods just as fully as they did in my intense ones. It was quite clear to me that the support was there to use as I needed, but no one was going to force me to learn. That was my decision, and by extension my responsibility. It was this acceptance of the whole self and the process of natural learning which created an environment where I was free to learn and even more, to become truly my own person, in charge of my own education and my own personal development.

It is my intention that these examples serve to illustrate more than just the differences between a Montessori elementary and a traditional one. What the comparison made clear to me is the different human being Montessori schooling creates- or allows to develop. I may be wrong, but from my experiences, I think that it would be very difficult to develop that same person with that same fundamental vision of him/herself and the world in a traditional school. It was even difficult for me to maintain that already concrete sense of personal responsibility when faced with the distrust and suspicion present in the new school. The teachers took the responsibility of the students' education away from them and as a result there was no trust or belief that the child could take it on himself. Without this expectation, the students, myself included, simply did what was necessary to satisfy expectations- namely to get good grades. If this happened to a degree even to me, I do not know how one would develop if their formative years were spent there.

Though I struggled with the underlying philosophy of the traditional school, I did learn to sit in my assigned row, take in the knowledge they gave me and give it back to them when asked. That was actually quite easy- just not altogether satisfying. I passed notes in class just like the others, skipped classes once in a while, took tests and did very well academically. The school I went to was an excellent school by outside standards. It was known to be very supportive of students and very nurturing of their development. In every measurable way, I adapted very easily and I was happy socially. However, I also immediately began looking at my options for other schools and I transferred to two other schools in the next two years before finding one that I liked.

I know this may scare parents reading this and I want to be clear because I think this is certainly one point where the Montessori philosophy really shaped me. By any outside measurement, I made the transition to "normal school" very well. In fact, had there been

no other choices for school, I would have graduated from the local school and been fine. The difference with my background is that I did not judge myself based on these outside measurements. I knew that I was not learning as much as I could. I realised that much of my time was spent on busy work and on satisfying the teacher's need to quantify what I knew. Because I had already developed a responsibility for my own learning, I was not willing to accept the limits of the school so I researched other schools and applied to both public and private ones. In the absence of passion at school, this became my "great work". I tried out several schools over the next few years before I found the one that, though not Montessori, offered an environment that trusted its students and encouraged discussion. It is important to note that this school was exceptionally strict- actually it was a boarding school 12 hours from my home and we still took tests and in some classes listened to lectures. It was not the structure of the school that I had trouble with. What was different about this school was that it was truly a community of learners and the feeling of respect, challenge, and inspiration that I was looking for was present. The teachers were excited by our questions and the discussions were lively, informed, and exciting. When we had an assigned reading, the subsequent class started from the premise that it had been read and the discussion extended the boundaries of the reading. The purpose of the classes were to go further- not to check if we had done the reading. It was what I had grown to expect from a school and I was not willing to accept less- even if I had to travel 900 miles to get there.

Many people have heard my story and say, "if it was so difficult for you, then maybe you should have left Montessori earlier" or suggest that there is something wrong with the Montessori approach if it is difficult to transition to a traditional school. I would offer the counter argument. There is something wrong with a traditional school if it takes away the love of learning from its students. It is a natural impulse to never want your child to have a difficult time, but I am so grateful to my mother for choosing a Montessori school for me. Yes, it was more difficult for me to adjust and yes, it was hard to change schools, but I am grateful that at twelve, I was capable of adapting and succeeding (by outside measurements) to the circumstance I was in while at the same time determining that it was not right for me by my own internal gauge. I am grateful that learning is part of who I am and as such it does not end with my last formal class, but will continue throughout my life. I am grateful for an environment during my formative years which trusted me to question because now I will always seek out answers and delve into mysteries- not because I am asked to, but because that seeking is part of who I am.

Perhaps that is the essence of a Montessori background - to experience a form of schooling which is so integral to ones' self development that the adult reflecting back really cannot separate "school" from "life". There is no "them" versus "us" to make that distinction. No one is imparting knowledge or granting permission to learn, to walk, or to use the bathroom. I cannot separate school from me because the essence of a Montessori education is that it is you. Reflecting back the adult remembers glimpses of knowledge, flashes of fun, excitement, triumph and defeats, but knows that in some inexplicable way, she is who she is because of the melding of an innate self and an environment which is truly designed to support the natural unfolding of that self. In that way, the Montessori schooling is so much more than a school. It is truly an "aid to life" with the long term goal not to impart knowledge, but to enable the individual to develop and grow to reach their own standards of justice, wisdom, and moral structure; in essence to reach their full potential as human beings and at a societal level to push that potential to its limits.

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## Orange County Public Schools 2010-2011 School Calendar

Monday-Friday	August 16, 17, 19, 20	Pre Planning
Wednesday	August 18	Staff Development Day
Monday	August 23	First Day of School
Monday	September 6	Holiday
Friday	October 15	Statewide Professional Day Student Holiday Teacher Non Workday
Thursday	October 28	End of 1 <sup>st</sup> Marking Period (47 days)
Friday	October 29	Student Holiday Teacher Workday
Monday	November 1	Begin 2 <sup>nd</sup> Marking Period
Monday	November 22	Student Holiday/Teacher Non Workday
Tuesday	November 23	Holiday
Wednesday-Friday	November 24-26	Thanksgiving Break
Two Weeks	December 20-31	Winter Break
Monday	January 17	Holiday
Thursday	January 20	End of 2 <sup>nd</sup> Marking Period (43 days)
Friday	January 21	Student Holiday Teacher Workday
Monday	January 24	1 <sup>st</sup> day, 2 <sup>nd</sup> semester
Monday	February 21	Holiday
Thursday	March 24	End of 3 <sup>rd</sup> Marking Period (43 days)
Friday	March 25	Student Holiday Teacher Workday
Monday-Friday	March 28-April 1	Spring Break
Monday	April 4	Begin 4 <sup>th</sup> Marking Period
Monday	May 30	Student/Teacher Holiday
Wednesday	June 8	Last day of school End of 4 <sup>th</sup> Marking Period (47 days)
Thursday-Friday	June 9-10	Post Planning

1<sup>st</sup> Semester: 90 Days (47/43)  
2<sup>nd</sup> Semester: 90 Days (43/47)

**Because school is not out until June, Summer School  
will extend through the middle of July.**

**Paid Holidays for 10-month Instructors: Labor Day, Thanksgiving Day, New Year's Day, Martin Luther King, Jr. Day, Fall Holiday, Memorial Day**

**PRIORITIZED BAD WEATHER DAYS  
2010-2011**

<b>PRIORITY</b>	<b>DATE</b>	<b>CURRENT USE</b>
1	October 15	Statewide Professional Day
2	October 29	Teacher Workday
3,4,5	Designated Wednesday Afternoons	Staff Development, Department Meetings
6	January 21	Teacher Workday
7	March 25	Teacher Workday
8	March 28	Spring Break
9	March 29	Spring Break
10	January 17	Martin Luther King Holiday
11	February 21	Presidents' Day

# Montessori and FLORIDA NEXT GENERATION STANDARDS Correlation

Montessori Made Manageable works with many school districts around the country, correlating the district, state, or national objectives to the other curriculums.

This correlation can be used best in conjunction with our Montessori lesson plan and our Monitoring Student Progress Forms. We suggest that teachers plan their group and individual student lessons with all three of these materials in front of them.

This document is useful to the district, the administration, the teacher and most importantly to the student, ensuring that they have been presented the entire state curriculum while staying true to the Montessori philosophy and curriculum.

The FLORIDA NEXT GENERATION STANDARDS have been correlated to the Montessori curriculum. We have emailed you the files with the master copies of the correlations. Each level has a color to assist teachers in identifying the grade level more easily.

We hope you find the actual correlation format to be easy and efficient to use. The correlations are broken down into curriculum areas: Language, Math, Social Studies, Science etc. Within each area, the Montessori Lesson or Skill is typed in bold at the top of each box followed by the Montessori Materials / Resources needed. This is the sequence of the Montessori curriculum. You may highlight the first, second or third level that should be mastering this lesson. Underneath the bold heading, you will find the letters and numbers taken directly from the FLORIDA NEXT GENERATION STANDARDS. When the FLORIDA NEXT GENERATION STANDARDS does not fit into the Montessori curriculum, you will not find a picture of the Montessori Lesson corresponding and the teacher needs to create lessons for students to master the specified standards.

<b>Color Coding:</b> Each year follows the colors of the stamp game (green – units, blue – tens, red – hundreds) so that the youngest in the class is color-coded green, middle group is blue and oldest in the class is red.			
<b>Green</b>	3 year olds (Pre K) in the 3-6 classroom	6 year olds (1 <sup>st</sup> grade) in the 6-9 classroom	9 year olds (4 <sup>th</sup> grade) in the 9-12 classroom
<b>Blue</b>	4 year olds (Pre K) in the 3-6 classroom	7 year olds (2 <sup>nd</sup> grade) in the 6-9 classroom	10 year olds (5 <sup>th</sup> grade) in the 9-12 classroom
<b>Red</b>	5 year olds (K) in the 3-6 classroom	8 year olds (3 <sup>rd</sup> grade) in the 6-9 classroom	11 year olds (6 <sup>th</sup> grade) in the 9-12 classroom

<b>COLOR CODING FOR MULTIPLE GRADES:</b> There are some Standards that are for multiple grades. In that case they are Coded as follows			
<b>Purple</b>	3 and 4 year olds (Pre K) students in the classroom	6 and 7 year olds (Gr 1-2) students in the classroom	9 and 10 year olds (Gr. 4-5) students in the classroom
<b>Brown</b>	5 and 6 year olds (Pre K-K) students in the classroom	8 and 9 year olds (Gr 2-3) students in the classroom	11 and 12 year olds (Gr. 5-6) students in the classroom
<b>Black</b>	3-6 year olds (Pre K-K) students in the classroom	6-9 year olds (Gr. 1-3) students in the classroom	9-12 year olds (Gr. 4-6) students in the classroom

On the following page, you will find two samples, one Language and one Math. First you will see The Montessori Skill / Lesson followed by the Montessori Materials / Resources. We have included photos of the Montessori Materials / Resources. The teacher can highlight what grade level needs to have the skill presented. Finally the teacher needs to date when the lesson was presented / mastered. This can be done with color coding as well (green – first level, blue – second level, and third level – red) There are extra spaces to record each time the lesson was presented if more than once.

If you have any questions, please feel free to call us at (513) 861-4559 or email at [mmmlisa@msn.com](mailto:mmmlisa@msn.com).

<b>Reading</b>
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<small>Date of instruction</small>
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*Montessori Skill / Lesson:* Introduction to the Decimal

**System**

*Montessori Material / Resources:* Golden Beads /

**Layouts / Composing a Number – Symbol & Quantity (Magic Slide) / Introduction to Decimal System**

*Montessori Level:*

First Year

Second Year

Third Year

**Grade 1**

Strand: Number (Number Concepts)

*Students will:* · use numbers to describe quantities  
· represent numbers in multiple ways.

**General Outcome**

Recognize & apply whole numbers from 0 -100 & explore halves, in familiar settings.

5. Represent and describe numbers to 50 in a variety of ways. [C, PS, R, V]

**Grade 2**

Strand: Number (Number Concepts)

*Students will:* · use numbers to describe quantities and represent numbers in multiple ways.

**General Outcome**

Recognize and apply whole numbers up to 1000, and explore fractions (halves, thirds and quarters).

**Specific Outcomes**

3. Recognize, build, compare and order sets that contain 0 to 100 elements. [V]

**Grade 3**

Strand: Number (Number Concepts)

*Students will:* · use numbers to describe quantities  
· represent numbers in multiple ways.

**General Outcome**

Develop a number sense for whole numbers 0 to 1000, and explore fractions

**Specific Outcomes**

1. Count by 2s, 5s, 10s and 100s to 1000, using random starting points. [CN]



Horizontal lines for writing notes.











Montessori Skill / Lesson: **Word Origins**

Montessori Material / Resources: **Word Study Boxes**

Montessori Level: **First Year**      **Second Year**      **Third**  
Year



Montessori Skill / Lesson: **Compounds**

Montessori Material / Resources: **Word Study Boxes**

Montessori Level: **First Year**      **Second Year**      **Third**  
Year





*Montessori Skill / Lesson:* Singular / Plural / Possessive

*Montessori Material / Resources:* Word Study Boxes

*Montessori Level:* First Year Second Year Third  
Year

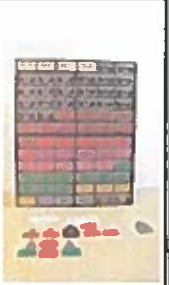


*Montessori Skill / Lesson:* Homophones / Homonyms /

**Homographs**

*Montessori Material / Resources:* Word Study Boxes

*Montessori Level:* First Year Second Year Third  
Year



Language Standards K-5

Grade 4 Students:

1. Demonstrate command of the conventions of standard English grammar and usage when writing and speaking.
  - g. Correctly use frequently confused words (e.g., to, too, two; there, their).

**Language Progressive Skills by Grade Standard**

**L.4.1.g.** Correctly use frequently confused words (e.g., to/too/two; there/their).



*Montessori Skill / Lesson:* Vocabulary

*Montessori Material / Resources:* Word Study Boxes,

**Vocabulary Series**

*Montessori Level:*

**First Year**

**Second Year**

**Third**

**Year**

Reading Standards for Informational Text K-5

**Grade 4 Students:**

4. Determine the meaning of general academic and domain-specific words of phrases in a text relevant to a grade 4 topic of subject area.

Reading Standards for Informational Text K-5

**Grade 5 Students:**

4. Determine the meaning of general academic and domain-specific words and phrases in a text relevant to a grade 5 topic or subject area.

Reading Standards for Informational Text 6-12

**Grade 6 Students:**

Craft and Structure

4. Determine the meaning of words and phrases as they are used in a text, including figurative, connotative, and technical meanings.

Language Standards K-5

**Grade 4 Students:**

6. Acquire and use accurately grade-appropriate general academic and domain-specific words and phrases, including those that signal precise actions, emotions, or states of being (e.g. quizzed, whined, stammered) and that are basic to a particular topic (e.g., wildlife, conservation, and endangered when discussing animal preservation).

Language Standards K-5

**Grade 5 Students:**

6. Acquire and use accurately grade-appropriate general academic and domain-specific words and phrases, including those that signal precise actions, addition, and other logical relationships (e.g., however, although, nevertheless, similarly, moreover, in addition).

Language Standards 6-12

**Grade 6 Students:**

Knowledge of Language

6. Acquire and use accurately grade-appropriate general academic and domain-specific words and phrase: gather vocabulary knowledge when considering a word or phrase important to comprehension or expression.



A vertical column of 20 horizontal lines for writing notes or answers.





2. Reason abstractly and quantitatively.
3. Construct viable arguments and critique the reasoning of others.
4. Model with mathematics.
5. Use appropriate tools strategically.
6. Attend to precision.
7. Look for and make use of structure.
8. Look for and express regularity in repeated reasoning.

## Numeration

### Number and Operations in Base Ten

- Generalize place value understanding for multi-digit whole numbers.
- Use place value understanding and properties of operations to perform multi-digit arithmetic.

Date of instruction

*Montessori Skill / Lesson:* **Reading Numbers – Writing**

**Numbers / Place Value**

*Montessori Material / Resources:* **Golden Beads /**

**Numeral Cards**

*Montessori Level:*

	First Year	Second Year	Third
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**Year**

Number and operations in Base Ten <sup>2</sup>	4.NBT		
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**Generalize place value understanding for multi-digit whole numbers.**

1. Recognize that in a multi-digit whole number, a digit in one place represents ten times what it represents in the place to its right. For example, recognize that  $700 \div 70 = 10$  by applying concepts of place value and division.

Number and operations in Base Ten	5.NBT		
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**Understand the place value system.**

1. Recognize that in a multi-digit number, a digit in one place represents 10 times as much as it represents in the place to its right and 1/10 of what it represents in the place to its left.




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*Montessori Skill / Lesson:* Greater Than / Less Than / Equal

To

*Montessori Material / Resources:* Bead Bars / Equality

Box

*Montessori Level:*

First Year

Second Year

Third

Year

Number and operations in Base Ten<sup>2</sup>

4.NBT

Generalize place value understanding for multi-digit whole numbers.

2. Read and write multi-digit whole numbers using base-ten numerals, number names, and expanded form. Compare two multi-digit numbers based on meanings of the digits in each place, using  $>$ ,  $=$ , and  $<$  symbols to record the results of comparisons.



*Montessori Skill / Lesson:* Sequencing Numbers / Ordinals

*Montessori Material / Resources:* Number Line

*Montessori Level:*

First Year

Second Year

Third

Year



Montessori Skill / Lesson: Rounding / Estimating

Montessori Material / Resources: Number Line / Word

**Problems**

Montessori Level:

First Year

Second Year

Third

**Year**

Number and operations in Base Ten<sup>2</sup>

4.NBT

Generalize place value understanding for multi-digit whole numbers.

3. Use place value understanding to round multi-digit whole numbers to any place.



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**Multiples**

**The Number System**

- Apply and extend previous understandings of multiplication and division to divide fractions by fractions.
- Compute fluently with multi-digit numbers and find common factors and multiples.
- Apply and extend previous understandings of numbers to the system of rational numbers.

Date of instruction

Montessori Skill / Lesson: Least Common Multiple /

Greatest Common Factor

Montessori Material / Resources: Peg Board, Prepared

Guided Individualized Worksheets

Montessori Level:

First Year

Second Year

Third

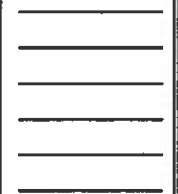
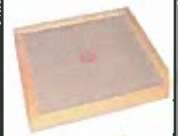
Year

The Number System

6.NS

Compute fluently with multi-digit numbers and find common factors and multiples.

- Find the greatest common factor of two whole numbers less than or equal to 100 and the least common multiple of two whole numbers less than or equal to 12. Use the distributive property to express a sum of two whole numbers 1–100 with a common factor as a multiple of a sum of two whole numbers with no common factor. Example: express  $36 + 8$  as  $4(9 + 2)$ .



*Montessori Skill / Lesson:* Sieve of Eratosthenes / Factor

**Trees / Prime Factors / Composite**

*Montessori Material / Resources:* Peg Board, Prepared

**Guided Individualized Worksheets**

*Montessori Level:*

First Year

Second Year

Third

**Year**

Operations and Algebraic Thinking 4.oA

**Gain familiarity with factors and multiples.**

4. Find all factor pairs for a whole number in the range 1–100. Recognize that a whole number is a multiple of each of its factors. Determine whether a given whole number in the range 1–100 is a multiple of a given one-digit number. Determine whether a given whole number in the range 1–100 is prime or composite.



**Other Bases**

Date of instruction







## **Geometry**

### **Geometry**

- Draw and identify lines and angles, and classify shapes by properties of their lines and angles.

### **Geometry**

- Graph points on the coordinate plane to solve real-world and mathematical problems.
- Classify two-dimensional figures into categories based on their properties.

### **Geometry**

- Solve real-world and mathematical problems involving area, surface area, and volume.

Date of Instruction



Montessori Skill / Lesson: Point / Line / Surface

Montessori Material / Resources: Geometric Sticks

Montessori Level: First Year Second Year Third  
Year



Montessori Skill / Lesson: Geometric Solids / 2D & 3D

Montessori Material / Resources: Geometric Solids /

Geometric Cabinet

Montessori Level: First Year Second Year Third  
Year

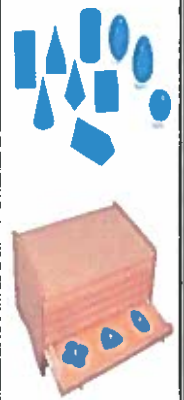
Geometry

5.G

**Classify two-dimensional figures into categories based on their properties.**

3. Understand that attributes belonging to a category of two-dimensional figures also belong to all subcategories of that category. For example, all rectangles have four right angles and squares are rectangles, so all squares have four right angles.

4. Classify two-dimensional figures in a hierarchy based on properties.







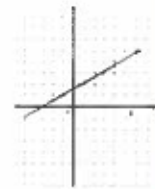




# Montessori Skill / Lesson: Plotting / Ordered Pairs /

## Coordinate Planes

# Montessori Material / Resources: Graph Paper /



## Plotting Lessons

# Montessori Level: First Year Second Year Third

### Year

Measurement and Data 4.MD

### Represent and interpret data.

4. Make a line plot to display a data set of measurements in fractions of a unit ( $1/2$ ,  $1/4$ ,  $1/8$ ). Solve problems involving addition and subtraction of fractions by using information presented in line plots. For example, from a line plot find and interpret the difference in length between the longest and shortest specimens in an insect collection.

Operations and Algebraic Thinking 5.oA

### Analyze patterns and relationships.

3. Generate two numerical patterns using two given rules. Identify apparent relationships between corresponding terms. Form ordered pairs consisting of corresponding terms from the two patterns, and graph the ordered pairs on a coordinate plane. For example, given the rule "Add 3" and the starting number 0, and given the rule "Add 6" and the starting number 0, generate terms in the resulting sequences, and observe that the terms in one sequence are twice the corresponding terms in the other sequence. Explain informally why this is so.

Geometry 5.G

### Graph points on the coordinate plane to solve real-world and mathematical problems.

1. Use a pair of perpendicular number lines, called axes, to define a coordinate system, with the intersection of the lines (the origin) arranged to coincide with the 0 on each line and a given point in the plane located by using an ordered pair of numbers, called its coordinates. Understand that the first number indicates how far to travel from the origin in the direction of one axis, and the second number indicates how far to travel in the direction of the second axis, with the convention that the names of the two axes and the coordinates correspond (e.g., x-axis and x-coordinate, y-axis and y-coordinate).

Lined writing area for notes.



# Montessori Skill / Lesson: Plotting / Ordered Pairs /

## Coordinate Planes

# Montessori Material / Resources: Graph Paper /

## Plotting Lessons

### Montessori Level:

First Year

Second Year

Third

### Year

Geometry

5.G

**Graph points on the coordinate plane to solve real-world and mathematical problems.**

2. Represent real world and mathematical problems by graphing points in the first quadrant of the coordinate plane, and interpret coordinate values of points in the context of the situation.

The Number System

6.NS

**Apply and extend previous understandings of numbers to the system of rational numbers.**

6. Understand a rational number as a point on the number line. Extend number line diagrams and coordinate axes familiar from previous grades to represent points on the line and in

a. Understand signs of numbers in ordered pairs as indicating locations in quadrants of the coordinate plane; recognize that when two ordered pairs differ only by signs, the locations of the points are related by reflections across one or both axes.

c. Find and position integers and other rational numbers on a horizontal or vertical number line diagram; find and position pairs of integers and other rational numbers on a coordinate plane.

The Number System

6.NS

**Apply and extend previous understandings of numbers to the system of rational numbers.**

8. Solve real-world and mathematical problems by graphing points in all four quadrants of the coordinate plane. Include use of coordinates and absolute value to find distances between points with the same first coordinate or the same second coordinate.

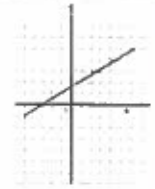
Geometry

6.G 62

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**Solve real-world and mathematical problems involving area, surface area, and volume.**

3. Draw polygons in the coordinate plane given coordinates for the vertices; use



A vertical column of horizontal lines for writing notes, consisting of 20 lines.

## Hill View Montessori Charter Public School, Curriculum Alignment Chart Grades 4 through 6 MATHEMATICS

MA Curriculum Standards, Mathematics	Montessori Lessons	Materials
<p><b>Grade 4 Number Sense &amp; Operations</b> <i>Students engage in problem solving, communicating, reasoning, connecting, and representing as they:</i></p> <p><b>Number Sense</b></p> <p>4.N.1 Exhibit understanding of base ten system by reading, modeling, writing, interpreting whole numbers to at least 100,000; demonstrate understanding of the values of digits; compare and order the numbers.</p> <p>4. N.2 Represent, order, and compare large numbers (to at least 100,000) using various forms, including expanded notation (<math>853=800+50+3</math>).</p> <p>4. N.7 Represent classes (odds, evens, factors, multiples, squares) to which a number may belong; identify numbers in those classes; use in solving problems.</p>	<p>* Mathematics study at all grade levels begins with the Great Lesson, The Story of Numbers.</p> <ul style="list-style-type: none"> <li>▪ Decimal System- Second Presentation: Intro. To Symbols</li> <li>▪ Numerals and Quantities</li> <li>▪ Number Composition</li> <li>▪ Study of Multiples and Factors- First presentation of multiples</li> </ul>	<p>*Montessori Materials are stated as well as supplemental materials</p> <ul style="list-style-type: none"> <li>▪ Golden Beads and Cards</li> <li>▪ Large Bead Frame</li> <li>▪ Stamp Game</li> <li>▪ Golden Beads and Cards</li> <li>▪ Small Numeral Cards</li> <li>▪ Albanese Cards</li> <li>▪ Pegboard &amp; pegs</li> <li>▪ Tables A &amp; B</li> <li>▪ Table of Multiples</li> <li>▪ Table C</li> </ul>
<p><b>Operations</b></p> <p>4. N.8 Select, use, explain various meanings and models of multiplication and division; understand and use the inverse relationship between the two operations.</p> <p>4.N.9 Select, use, explain commutative, associative, identity properties in problem situations (<math>37 \times 46 = 46 \times 37</math>).</p> <p>4. N.10 Select and use appropriate operations (add, subtract, multiply, divide) to solve problems, including those with money.</p> <p>4. N.11 Know <math>\times</math> and <math>\div</math> facts to <math>12 \times 12</math>; use to solve related multiplication problems (<math>3 \times 5</math> related to <math>30 \times 50</math>, <math>300 \times 5</math>, <math>30 \times 500</math>).</p>	<ul style="list-style-type: none"> <li>▪ Memorization Exercise- Commutative property</li> <li>▪ Memorization Exercise- Ways of constructing a product</li> <li>▪ Memorization Exercise- Commutative property</li> <li>▪ Memorization Exercise- Ways of constructing a product</li> </ul>	<ul style="list-style-type: none"> <li>▪ Colored bead bar box</li> <li>▪ Colored bead bar box</li> <li>▪ Finger Charts</li> <li>▪ Albanese Cards</li> <li>▪ Math Stories.com (order)</li> <li>▪ Bead box</li> <li>▪ Bead cabinet</li> </ul>



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4. N.12 Add and subtract (up to 5 digits) and multiply (up to 3 digits by 2 digits) accurately and efficiently.	<ul style="list-style-type: none"> <li>▪ Operations- Multiplication= 2<sup>nd</sup>-5<sup>th</sup> technique</li> </ul>	<ul style="list-style-type: none"> <li>▪ Checkerboard</li> <li>▪ Math problems on cards</li> </ul>
4. N.13 Divide 3 digits by 1 w/ or w/out remainders efficiently and accurately (algorithm); interpret any remainders.	<ul style="list-style-type: none"> <li>▪ Operations- Division= Short Division/Division w/ one cipher divisor</li> </ul>	<ul style="list-style-type: none"> <li>▪ Racks and Tubes</li> <li>▪ Math problems on cards</li> </ul>
4. N.14 Understand and use conventional algorithm for addition and subtraction (up to 5 digit numbers) and multiplication (up to 3 digits by 2 digits).	<ul style="list-style-type: none"> <li>▪ Operations- Addition and Subtraction</li> </ul>	<ul style="list-style-type: none"> <li>▪ Stamp Game</li> <li>▪ Large Bead Frame</li> <li>▪ Math problems on cards</li> </ul>
4.N.15 Use conventional algorithm for $\div$ of 3 digits by 1, with or without remainders.	<ul style="list-style-type: none"> <li>▪ Operations- Division- Long division</li> </ul>	<ul style="list-style-type: none"> <li>▪ Racks and Tubes</li> <li>▪ Math problems on cards</li> </ul>
<b>Estimation</b>		
4. N.16 Round whole numbers through 100,000 to the nearest 10, 100, 1000, 10,000 and 100,000.		<ul style="list-style-type: none"> <li>▪ <i>Albanese cards</i></li> </ul>
4.N.17 Use variety of strategies (front end, rounding, regrouping) to estimate quantities, measures, and results of whole number computations up to 3-digit numbers and up to \$1000; judge reasonableness of answers.		<ul style="list-style-type: none"> <li>▪ <i>Albanese cards</i></li> </ul>
<b>Fractions, Decimals, Percents</b>		
4. N.3 Demonstrate understanding of fractions as parts of unit wholes, as parts of a collection, as locations on a number line.	<ul style="list-style-type: none"> <li>▪ Introduction to Fractions</li> </ul>	<ul style="list-style-type: none"> <li>▪ Fraction insets</li> <li>▪ Number line</li> </ul>
4. N.4 Select, use, explain models to relate common fractions and mixed numbers ( $1/2$ , $1/3$ , $1/4$ , $1/5$ , $1/6$ , $1/8$ , $1/10$ , $1/12$ , $1\ 1/2$ ), find equivalent fractions, mixed numbers and decimals, and order fractions.	<ul style="list-style-type: none"> <li>▪ Fractions- First presentation (denominator). Second presentation (numerator)</li> <li>▪ Fractions Equivalences</li> <li>▪ Introductory Decimal Presentation</li> </ul>	<ul style="list-style-type: none"> <li>▪ Fraction insets</li> </ul>

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<p>4. N.5 Identify and generate equivalent forms of common decimals and fractions less than one whole (halves, quarters, fifths, tenths).</p> <p>4.N.6 Exhibit understanding of base ten system by reading, naming, writing decimals between 0 and 1 up to hundredths.</p>	<ul style="list-style-type: none"> <li>▪ Fractions- Equivalence</li> <li>▪ Comparing Decimal Numbers</li> <li>▪ Decimals- Introductory Presentations</li> <li>▪ Progressive and Regressive Counting</li> </ul>	<ul style="list-style-type: none"> <li>▪ Fraction Insets</li> <li>▪ Decimal circle</li> <li>▪ Decimal board, beads, disks</li> <li>▪ Decimal board, beads, disks</li> <li>▪ Decimal skittles</li> <li>▪ Felt pieces for building checkerboard</li> </ul>
<p>4. N.18 Use concrete objects and visual models to add and subtract common fractions.</p>	<ul style="list-style-type: none"> <li>▪ Adding fractions with same denominator</li> <li>▪ Subtracting fractions with same denominator</li> </ul>	<ul style="list-style-type: none"> <li>▪ Fraction insets</li> <li>▪ Objects</li> </ul>
<p><b>MA Curriculum Standards, Mathematics</b></p> <p><b>Grade 4 Patterns, Relations, &amp; Algebra</b></p> <p><i>Students engage in problem solving, communicating, reasoning, connecting, and representing as they:</i></p> <p><b>Patterns</b></p> <p>4. P.1 Create, describe, extend, explain symbolic (geometric) and numeric patterns including multiplication patterns like 3, 30, 300....</p>	<p style="text-align: center;"><b>Montessori Lessons</b></p>	<p style="text-align: center;"><b>Materials</b></p> <ul style="list-style-type: none"> <li>▪ Multiplication chart</li> </ul>
<p><b>Equations &amp; Algebra</b></p> <p>4. P.2 Use symbol/letter variables for unknowns that vary in equations or inequalities using <math>&lt;</math>, <math>&gt;</math>, <math>=</math>.</p> <p>4. P.3 Determine values of variables in simple equations (<math>4106-x = 371</math>).</p>		<ul style="list-style-type: none"> <li>▪ EdHelper.com</li> <li>▪ Mathdrills.com</li> <li>▪ Albanese cards</li> <li>▪ Albanese Cards</li> <li>▪ EdHelper.com</li> </ul>
<p><b>Mathematical Relationships</b></p> <p>4. P.4 Use pictures, models, tables, charts, graphs, words, number sentence to interpret relationships.</p>		<ul style="list-style-type: none"> <li>▪ Trinomial Cube</li> </ul>

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<p>4. P.5 Solve problems using proportional relationships, including unit pricing (4 apples for 80 cents so 1 costs 20 cents) map interpretation (1 in. = 5 miles so 3 in. = 15 miles).</p>		<ul style="list-style-type: none"> <li>▪ Ratio &amp; Proportion presentations with pegboard/pegs, skittles, rubber stamp pictures, bead bars/bead squares</li> <li>▪ <i>Spectrum Mathematics</i></li> </ul>
<p>4. P.6 Determine how change in one variable relates to changes in a second variable/input-output table.</p>		<ul style="list-style-type: none"> <li>▪ Written word problems</li> </ul>

<p><b>MA Curriculum Standards, Mathematics</b></p>	<p><b>Montessori Lessons</b></p>	<p><b>Materials</b></p>
<p><b>Grade 4 Geometry</b> <i>Students engage in problem solving, communicating, reasoning, connecting, and representing as they:</i></p>	<p>*Geometry study begins with the Story of Geometry.</p>	
<p>4. G.1 Compare and analyze attributes and other features (number of sides, faces, corners, right angles, diagonals, symmetry) of 2-D and 3-D geometric shapes.</p>	<ul style="list-style-type: none"> <li>▪ Foundations of Geometry- Geometric solids, Geometric Cabinet, Constructive Triangles</li> </ul>	<ul style="list-style-type: none"> <li>▪ Geometric Cabinet</li> <li>▪ Constructive Triangles</li> <li>▪ Geometric Solids</li> </ul>
<p>4. G.2 Describe, model, draw, compare, classify 2-D and 3-D (circles, polygons, esp. triangles and quadrilaterals – cubes, spheres, and pyramids).</p>	<ul style="list-style-type: none"> <li>▪ Foundations of Geometry- Geometric solids, Geometric Cabinet, Constructive Triangles</li> </ul>	<ul style="list-style-type: none"> <li>▪ Geometric Cabinet</li> <li>▪ Constructive Triangles</li> <li>▪ Geometric Solids</li> </ul>
<p>4. G.3 Recognize similar features.</p>	<ul style="list-style-type: none"> <li>▪ Foundations of Geometry- Geometric Cabinet and Constructive Triangles</li> </ul>	<ul style="list-style-type: none"> <li>▪ Metal Inset material</li> <li>▪ Constructive Triangle material</li> </ul>
<p>4. G.4 Identify angles as acute, right, and obtuse.</p>	<ul style="list-style-type: none"> <li>▪ Study of Angles- Types of Angles</li> </ul>	<ul style="list-style-type: none"> <li>▪ Box of Sticks</li> <li>▪ Constructive Triangles</li> </ul>
<p>4. G.5 Describe and draw intersecting, parallel, perpendicular lines.</p>	<ul style="list-style-type: none"> <li>▪ The Study of Lines- Relationship between Straight Lines</li> </ul>	<ul style="list-style-type: none"> <li>▪ Box of Sticks</li> <li>▪ Classified Nomenclature</li> </ul>

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4. G.6 Using ordered pairs of numbers and/or letters, graph, locate, identify points, and describe paths (first quadrant).		<ul style="list-style-type: none"> <li>▪ <i>Albanese cards</i></li> </ul>
4. G.7 Describe and apply techniques such as reflections (flips) rotations (turns), and translations (slides) for checking congruency.	<ul style="list-style-type: none"> <li>▪ Relationship between figures- Congruency. Similarity. Equivalency</li> </ul>	<ul style="list-style-type: none"> <li>▪ Geometric Cabinet</li> </ul>
4. G.8 Identify and describe line symmetry in 2-D shapes.	<ul style="list-style-type: none"> <li>▪ The Study of Triangles- Lines of Symmetry</li> <li>▪ The Study of Quadrilaterals- Lines of Symmetry</li> </ul>	<ul style="list-style-type: none"> <li>▪ Geometric Cabinet</li> <li>▪ Geometric Solids</li> </ul>
4. G.9 predict and validate results of partitioning, folding, combining 2-D, 3-D shapes.		<ul style="list-style-type: none"> <li>▪ Geometric Solids</li> <li>▪ Geometric Stick Box</li> </ul>
<b>MA Curriculum Standards, Mathematics</b>	<b>Montessori Lessons</b>	<b>Materials</b>
<p><b>Grade 4 Measurement</b> <i>Students engage in problem solving, communicating, reasoning, connecting, and representing as they:</i></p>	<p>*Measurement study begins with the Key Lesson, The Story of Measurement</p>	
4. M.1 Demonstrate understanding of length, area, weight, volume and select appropriate type of unit for measuring each attribute.	<ul style="list-style-type: none"> <li>▪ Study of Lines- Measurement of Lines; Linear Measurement (Standard system). Linear Measurement (Metric system)</li> <li>▪ Study of Volume</li> <li>▪ Study of Surface Area</li> </ul>	<ul style="list-style-type: none"> <li>▪ Rulers- yardstick, standard rulers with gradations down to sixteenths of an inch. Meter stick</li> <li>▪ Box of cubes</li> <li>▪ Area material</li> <li>▪ Square based rectangular prism, green prisms, light blue prisms</li> </ul>
4. M.2 Carry out simple unit conversions within a system of measurement (hours to minutes, cents to dollars, yards to feet or inches, etc.).		<ul style="list-style-type: none"> <li>▪ <i>Keys to Measurement</i> by Key Curriculum Press</li> <li>▪ Albanese cards</li> </ul>
4. M.3 Identify time to the minute on analog and digital clocks using am and pm; compute elapsed time using clock and calendar.		<ul style="list-style-type: none"> <li>▪ <i>Keys to Measurement</i> by Key Curriculum Press</li> <li>▪ <i>Saxon Lesson 28</i> p. 133</li> </ul>

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<p>4. M.4 Estimate and find area and perimeter of rectangle, triangle or irregular shape using diagrams, models, grids or by measuring.</p>	<ul style="list-style-type: none"> <li>▪ The Study of Quadrilaterals- Measuring Perimeter</li> <li>▪ The Study of Surface Area- Surface area of a cube, Surface area of other prisms, Rectangular prisms</li> </ul>	<ul style="list-style-type: none"> <li>▪ Geometric Cabinet</li> <li>▪ Rectangles, squares and other shapes made from wood or cardboard</li> <li>▪ Cubes from cubing material</li> </ul>
<p>4. M.5 Identify and use appropriate metric and English units and tools (ruler, protractor, graduated cylinder, thermometer) to estimate, measure, solve problems involving length, area, volume, weight, time, angle size, temperature.</p>	<ul style="list-style-type: none"> <li>▪ Study of Lines- Measurement of Lines, Linear Measurement (Standard system), Linear Measurement (Metric system)</li> <li>▪ Study of Volume</li> <li>▪ Study of Surface Area</li> </ul>	<ul style="list-style-type: none"> <li>▪ Rulers- yardstick, standard rulers with gradations down to sixteenths of an inch, Meter stick</li> <li>▪ Box of cubes</li> <li>▪ Area material</li> <li>▪ Square based rectangular prism, green prisms, light blue prisms</li> </ul>

<p>MA Curriculum Standards, Mathematics</p>	<p>Montessori Lessons</p>	<p>Materials</p>
<p><b>Grade 4 Data Analysis, Statistics, &amp; Probability</b> <i>Students engage in problem solving, communicating, reasoning, connecting, and representing as they:</i></p>		
<p><b>Data Analysis &amp; Statistics</b></p>		
<p>4. D.1 Collect and organize data using observations, measurements, surveys or experiments and identify appropriate ways to display data.</p>		
<p>4. D.2 Match representations of a data set such as lists, tables, graphs, (bar, line, circle) with the actual set of data.</p>		<ul style="list-style-type: none"> <li>▪ <i>Test Ready</i> by Curriculum Associates</li> <li>▪ <i>Saxon Investigation 8</i> p.417</li> </ul>
<p>4.D.3 Construct, draw conclusions, make predictions from various data sets, including tables, bar graphs, pictographs, line plots, and tallies.</p>		<ul style="list-style-type: none"> <li>▪ <i>Test Ready</i> by Curriculum Associates</li> <li>▪ <i>Saxon Investigation 8</i> p. 417</li> </ul>
<p><b>Probability</b></p>		

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4. D.4 Represent possible outcomes for a simple situation (pulling red marbles from a bag of 3 red, 4 green).		
4. D.5 List and count the number of possible combinations of objects from 3 sets, e.g. how many different outfits from a set of three shirts and a set of two skirts and 2 hats.		<ul style="list-style-type: none"> <li>Saxon (6/5) Lesson 57 p. 284</li> <li>Figure It Out- S. Cohen</li> </ul>
4. D.6 Classify outcomes as certain, likely, unlikely, impossible by designing/conducting experiments (spinners, coin...).		<ul style="list-style-type: none"> <li>Saxon Lesson 57 p. 284</li> <li>Investigation 6 p. 302</li> </ul>

## Grades 5 & 6

<i>Number Sense &amp; Operations</i>		
<b>Number Sense</b>		
6. N.1 Demonstrate an understanding of positive integer exponents, in particular, when used in powers of ten.		<ul style="list-style-type: none"> <li>Decimal Board</li> </ul>
6. N.2 Demonstrate an understanding of place value to billions and thousandths.	<ul style="list-style-type: none"> <li>Decimal System</li> <li>Numerals and Quantities</li> <li>Checkerboard- construction</li> <li>Decimal Checkerboard- construction</li> <li>Decimal System</li> <li>Numerals and Quantities</li> </ul>	<ul style="list-style-type: none"> <li>Small number cards</li> <li>Golden Beads</li> <li>Checkerboard Layout</li> <li>Decimal Board, beads, and cards</li> <li>Decimal Board, cards and beads</li> <li>Small numeral cards</li> <li>Mathdrills.com</li> </ul>
6. N.3 Represent and compare very large (billions) and very small (thousandths) positive numbers in various forms such as expanded notation without exponents. e.g. $9724=9 \times 1000 + 7 \times 100 + 2 \times 10 = 4$		<ul style="list-style-type: none"> <li>Decimal Board, cards and beads</li> <li>Small numeral cards</li> <li>Mathdrills.com</li> </ul>
<b>Operations</b>		
6.N. 8 Apply number theory concepts—including prime and composite numbers, prime factorization, greatest common factor, least common multiple, and divisibility rules for 2,3, 4, 5, 6, 9, and 10—to the solution of problems.	<ul style="list-style-type: none"> <li>Study of Multiples and Factors- First presentation of multiples, Common Multiples, Lowest Common Multiple, Greatest Common Factor, Prime Factor Trees, Passage to Abstraction</li> </ul>	<ul style="list-style-type: none"> <li>Tables A and B</li> <li>Table of Multiples</li> <li>Table C</li> <li>LCM command cards</li> <li>Pegboard and pegs</li> </ul>

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<p>6. N. 10 Use the number line to model addition and subtraction of integers, with the exception of subtracting negative integers.</p>	<ul style="list-style-type: none"> <li>▪ Integers- Introduction to the Concept of a Integer, Addition of Integers, Subtraction of Integers</li> </ul>	<ul style="list-style-type: none"> <li>▪ Poker chips</li> <li>▪ Integer number lines</li> <li>▪ Positive and negative numbers, parentheses,</li> <li>▪ Negative snake game</li> </ul>
<p>6. N.11 Apply the Order of Operations for expressions involving addition, subtraction, multiplication, and division with grouping symbols (+, −, ×, ÷).</p>	<ul style="list-style-type: none"> <li>▪ Decomposition of Number</li> </ul>	<ul style="list-style-type: none"> <li>▪ Albanese cards</li> <li>▪ Mathdrills.com</li> </ul>
<p>6. N.12 Demonstrate an understanding of the inverse relationship of addition and subtraction, and use that understanding to simplify computation and solve problems.</p>	<ul style="list-style-type: none"> <li>▪ Memorization Exercise- Commutative property</li> <li>▪ Addition-Static and dynamic</li> <li>▪ Subtraction- Static and dynamic</li> </ul>	<ul style="list-style-type: none"> <li>▪ Colored bead box</li> <li>▪ Stamp Game</li> <li>▪ Teacher and student created problems in math journals</li> </ul>
<p>6. N.13 Accurately and efficiently add, subtract, multiply, and divide (with double-digit divisors) whole numbers and positive decimals.</p>	<ul style="list-style-type: none"> <li>▪ Addition-Static and dynamic</li> <li>▪ Subtraction- Static and dynamic</li> <li>▪ Multiplication- Checkerboard</li> <li>▪ Division- Long Division with Two or Three Digit divisor</li> <li>▪ Operations with Decimals- Addition, Subtraction, Multiplication, and Division</li> </ul>	<ul style="list-style-type: none"> <li>▪ Stamp Game</li> <li>▪ Checkerboard</li> <li>▪ Racks and Tubes</li> <li>▪ Decimal Checkerboard</li> <li>▪ Decimal board, cards, and beads</li> </ul>
<p>6. N.15 Add and subtract integers, with the exception of subtracting negative integers.</p>	<ul style="list-style-type: none"> <li>▪ Integers- Introduction to the Concept of a Integer, Addition of Integers, Subtraction of Integers</li> </ul>	<ul style="list-style-type: none"> <li>▪ Poker chips</li> <li>▪ Integer number lines</li> <li>▪ Positive and negative numbers, parentheses, and negative snake game</li> </ul>
<p><b>Estimation</b></p> <p>6. N.16 Estimate results of computations with whole numbers, and with positive fractions, mixed numbers, decimals, and percents. Describe reasonableness of estimates.</p>		<ul style="list-style-type: none"> <li>▪ <i>Keys to Fractions</i></li> <li>▪ <i>Keys to Decimals</i></li> </ul>
<p><b>Fractions, Decimals, Percents</b></p> <p>6. N.5 Identify and determine common equivalent fractions, mixed numbers, decimals and percents.</p>	<ul style="list-style-type: none"> <li>▪ Fraction Equivalences</li> <li>▪ Second level work with fractions- Changing Improper fractions to</li> </ul>	<ul style="list-style-type: none"> <li>▪ Fraction circles</li> <li>▪ Decimal board, beads, disks</li> <li>▪ Decimal Circle</li> </ul>

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	<ul style="list-style-type: none"> <li>▪ mixed numbers</li> <li>▪ Operations with Decimals- Rounding off Decimal Numbers, Changing Decimals to Common Fractions, Changing Common Fractions to decimals</li> <li>▪ Study of Percentage- Converting Decimal numbers to percents, Converting percents to decimals</li> </ul>	<ul style="list-style-type: none"> <li>▪ Percent Circle</li> <li>▪ Fraction/decimal/percentage chart</li> </ul>
<p>6. N. 6 Find and position integers, fractions, mixed numbers and decimals (both positive and negative) on the number line.</p>	<ul style="list-style-type: none"> <li>▪ Concept of an Integer</li> <li>▪ Changing decimals to fractions</li> <li>▪ Comparing fractions</li> </ul>	<ul style="list-style-type: none"> <li>▪ Poker chips</li> <li>▪ Integer number line</li> <li>▪ Fraction insets</li> <li>▪ Decimal beads and disks</li> </ul>
<p>6. N. 7 Compare and order integers (including negative integers), and positive fractions, mixed numbers, decimals, and percents.</p>	<ul style="list-style-type: none"> <li>▪ Concept of an Integer</li> <li>▪ Comparing Fractions</li> <li>▪ Changing Fractions to Decimals</li> <li>▪ Percents- Converting Decimals to Percents, Converting Percents to Decimals</li> </ul>	<ul style="list-style-type: none"> <li>▪ Poker chips</li> <li>▪ Positive and negative numbers, parentheses</li> <li>▪ Fraction insets</li> <li>▪ Decimal skittles</li> <li>▪ Percent Circle</li> <li>▪ Fraction/decimal/percentage chart</li> </ul>
<p>6. N. 9 Select and use appropriate operations to solve problems involving +, -, x, ÷, and positive integer exponents with whole numbers, and with positive fractions, mixed numbers, decimals, and percents.</p>		<ul style="list-style-type: none"> <li>▪ Keys to Algebra</li> <li>▪ EdHelper.com</li> <li>▪ Mathdrills.com</li> </ul>
<p>6. N.14 Accurately and efficiently add, subtract, multiply, and divide positive fractions and mixed numbers. Simplify fractions.</p>	<ul style="list-style-type: none"> <li>▪ Second level fraction work- Adding fractions, Subtracting fractions, Adding mixed numbers, Subtraction mixed numbers, Multiplication of whole number by a fraction, Multiplication of a fraction by a fraction, Writing fractions in simplest form</li> </ul>	<ul style="list-style-type: none"> <li>▪ Fraction insets</li> <li>▪ Fraction pieces (in box)</li> <li>▪ Practice problems</li> </ul>



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<b>Grades 5 &amp; 6 Patterns, Relations, &amp; Algebra</b>		<b>Materials</b>
6.P.1 Analyze and determine the rules for extending symbolic, arithmetic, and geometric patterns and progressions, e.g., ABBCCC; 1, 5, 9, 13 ...; 3, 9, 27		<ul style="list-style-type: none"> <li>▪ EdHelper.com</li> <li>▪ <i>Saxon (6/5)</i> Lesson 1 p. 1</li> </ul>
6. P.2 Replace variables with given values and evaluate/simplify, e.g., $2(O) + 3$ when $O = 4$ .		<ul style="list-style-type: none"> <li>▪ <i>Keys to Algebra</i></li> <li>▪ Albanese cards</li> </ul>
6. P.3 Use the properties of equality to solve problems, e.g., if $\square + 7 = 13$ , then $\square = 13 - 7$ , therefore $\square = 6$ ; if $3 \times \square = 15$ , then $\frac{1}{3} \times 3 \times \square = \frac{1}{3} \times 15$ , therefore $\square = 5$ .		<ul style="list-style-type: none"> <li>▪ Colored bead bars and number cards</li> <li>▪ Albanese cards</li> <li>▪ EdHelper.com</li> <li>▪ Mathdrills.com</li> </ul>
6. P.4 Represent real situations and mathematical relationships with concrete models, tables, graphs, and rules in words and with symbols, e.g., input-output tables.		<ul style="list-style-type: none"> <li>▪ <i>Test Ready by Curriculum Associates</i></li> </ul>
6. P.5 Solve linear equations using concrete models, tables, graphs, and paper-pencil methods.		<ul style="list-style-type: none"> <li>▪ </li> </ul>
6. P.6 Produce and interpret graphs that represent the relationship between two variables in everyday situations.		<ul style="list-style-type: none"> <li>▪ <i>Excel: Advanced Mathematics</i></li> </ul>
6. P.7 Identify and describe relationships between two variables with a constant rate of change. Contrast these with relationships where the rate of change is not constant.		<ul style="list-style-type: none"> <li>▪ <i>Keys to Algebra</i></li> </ul>

**Hill View Montessori Charter Public School, Curriculum Alignment Chart  
 Grades 4 through 6 MATHEMATICS**

<b>Grades 5 &amp; 6 Geometry</b>		<b>Materials</b>
6. G.1 Identify polygons based on their properties, including types of interior angles, perpendicular or parallel sides, and congruence of sides, e.g., squares, rectangles, rhombuses, parallelograms, trapezoids, and isosceles, equilateral, and right triangles.	<ul style="list-style-type: none"> <li>▪ Polygons-Part 1 and 2 using the Box of Sticks</li> <li>▪ Geometric Stand for Height</li> <li>▪ Constructive Triangles</li> </ul>	<ul style="list-style-type: none"> <li>▪ Polygons-Part 1 and 2 using the Box of Sticks</li> <li>▪ Geometric Stand for Height</li> <li>▪ Constructive Triangles</li> </ul>
6. G.2 Identify three-dimensional shapes (e.g., cubes, prisms, spheres, cones, and pyramids) based on their properties, such as edges and faces.	<ul style="list-style-type: none"> <li>▪ Foundations of Geometry- Geometric Solids</li> </ul>	<ul style="list-style-type: none"> <li>▪ Geometric Solids</li> </ul>
6. G.3 Identify relationships among points, lines, and planes, e.g., intersecting, parallel, perpendicular.	<ul style="list-style-type: none"> <li>▪ Study of Lines- Relationship between Straight Lines</li> </ul>	<ul style="list-style-type: none"> <li>▪ Box of Sticks</li> </ul>
6. G.4 Graph points and identify coordinates of points on the Cartesian coordinate plane (all four quadrants).		<ul style="list-style-type: none"> <li>▪ <i>Excel: Advanced Mathematics</i></li> </ul>
6. G.5 Find the distance between two points on horizontal or vertical number lines.		<ul style="list-style-type: none"> <li>▪ <i>Excel: Advanced Mathematics</i></li> </ul>
6. G.6 Predict, describe, and perform transformations on two-dimensional shapes, e.g., translations, rotations, and reflections.	<ul style="list-style-type: none"> <li>▪ Foundations of Geometry</li> </ul>	<ul style="list-style-type: none"> <li>▪ Geometric Cabinet</li> <li>▪ Geometric stick material</li> </ul>
6. G.7 Identify types of symmetry, including line and rotational.	<ul style="list-style-type: none"> <li>▪ The Study of Quadrilaterals- Lines of Symmetry</li> </ul>	<ul style="list-style-type: none"> <li>▪ Metal Inset Cabinet</li> </ul>
6. G.8 Determine if two shapes are congruent by measuring sides or a combination of sides and angles, as necessary; or by motions or series of motions, e.g., translations, rotations, and reflections.	<ul style="list-style-type: none"> <li>▪ Relationships between Figures- Congruency. Equivalency</li> </ul>	<ul style="list-style-type: none"> <li>▪ Metal Inset Cabinet</li> <li>▪ Constructive Triangles</li> </ul>

**Hill View Montessori Charter Public School, Curriculum Alignment Chart  
Grades 4 through 6 MATHEMATICS**

6. G.9 Match three-dimensional objects and their two-dimensional representations, e.g., nets, projections, and perspective drawings.		<ul style="list-style-type: none"> <li>▪ <i>Keys to Geometry</i></li> </ul>
<b>Grades 5 &amp; 6 Measurement</b>		
6. M.1 Apply the concepts of perimeter and area to the solution of problems. Apply formulas where appropriate.		<p style="text-align: center;"><b>Materials</b></p> <ul style="list-style-type: none"> <li>▪ Yellow Area Material</li> <li>▪ <i>Keys to Measurement</i></li> </ul>
6. M.2 Identify, measure, describe, classify, and construct various angles, triangles, and quadrilaterals.	<ul style="list-style-type: none"> <li>▪ The Study of Angles</li> <li>▪ The Study of Quadrilaterals</li> <li>▪ The Study of Triangles</li> </ul>	<ul style="list-style-type: none"> <li>▪ Box of Sticks</li> <li>▪ Geometric Cabinet</li> <li>▪ Constructive Triangles</li> <li>▪ <i>Keys to Measurement</i></li> </ul>
6. M.3 Solve problems involving proportional relationships and units of measurement, e.g., same system unit conversions, scale models, maps, and speed.		<ul style="list-style-type: none"> <li>▪ <i>Keys to Measurement</i></li> </ul>
6. M.4 Find areas of triangles and parallelograms. Recognize that shapes with the same number of sides but different appearances can have the same area. Develop strategies to find the area of more complex shapes.	<ul style="list-style-type: none"> <li>▪ Relationships Between Figures</li> </ul>	<ul style="list-style-type: none"> <li>▪ Yellow Area Material</li> <li>▪ Constructive Triangles</li> <li>▪ Triangle Box, Large Hexagon Box, Small Hexagon Box, Insets of Equivalent Figures</li> </ul>
6. M.5 Identify, measure, and describe circles and the relationships of the radius, diameter, circumference, and area (e.g., $d = 2r$ , $\pi = C/d$ ), and use the concepts to solve problems.	<ul style="list-style-type: none"> <li>▪ The Study of the Circle- Study of the Apothem, The Circumference, Area of the Circle</li> </ul>	<ul style="list-style-type: none"> <li>▪ Geometric Cabinet</li> <li>▪ Circle Drawer</li> </ul>
6. M.6 Find volumes and surface areas of rectangular prisms.	<ul style="list-style-type: none"> <li>▪ The Study of Volume</li> <li>▪ The Study of Surface Area- Surface Area of a Cube, Surface Area of other prisms, Rectangular Prisms</li> </ul>	<ul style="list-style-type: none"> <li>▪ Box of cubes</li> <li>▪ Prisms</li> <li>▪ Green Prisms</li> </ul>
6. M.7 Find the sum of the angles in simple polygons (up to eight sides) with and without measuring the angles.	<ul style="list-style-type: none"> <li>▪ Study of Angles- Operations with Angles</li> </ul>	<ul style="list-style-type: none"> <li>▪ Montessori protractor</li> </ul>

**Hill View Montessori Charter Public School, Curriculum Alignment Chart  
Grades 4 through 6 MATHEMATICS**

<b>Grades 5 &amp; 6 Data Analysis, Statistics, &amp; Probability</b>		Materials
6.D.1 Describe and compare data sets using the concepts of median, mean, mode, maximum and minimum, and range.		<ul style="list-style-type: none"> <li>▪ <i>Saxon Investigation 10</i></li> </ul>
6. D.2 Construct and interpret stem-and-leaf plots, line plots, and circle graphs.		<ul style="list-style-type: none"> <li>▪ <i>Saxon Investigation 10</i></li> </ul>
6. D.3 Use tree diagrams and other models (e.g., lists and tables) to represent possible or actual outcomes of trials. Analyze the outcomes.		<ul style="list-style-type: none"> <li>▪ <i>Saxon Chapter 8- Probability</i></li> </ul>
6. D.4 Predict the probability of outcomes of simple experiments and test the predictions. Use appropriate ratios between 0 and 1 to represent the probability of the outcome and associate the probability with the likelihood of the event.		<ul style="list-style-type: none"> <li>▪ <i>Figure It Out- S. Cohen</i></li> </ul>

## THE EARLY YEARS

## Evaluating Montessori Education

Angeline Lillard<sup>1\*</sup> and Nicole Else-Quest<sup>2</sup>

An analysis of students' academic and social scores compares a Montessori school with other elementary school education programs.



Montessori education is a 100-year-old method of schooling that was first used with impoverished preschool children in Rome. The program continues to grow in popularity. Estimates indicate that more than 5000 schools in the United States—including 300 public schools and some high schools—use the Montessori program. Montessori education is characterized by multi-age classrooms, a special set of educational materials, student-chosen work in long time blocks, collaboration, the absence of grades and tests, and individual and small group instruction in both academic and social skills (1). The effectiveness of some of these elements is supported by research on human learning (2).

We evaluated the social and academic impact of Montessori education. Children were studied near the end of the two most widely implemented levels of Montessori education: primary (3- to 6-year-olds) and elementary (6- to 12-year-olds). The Montessori school we studied [located in Milwaukee, Wisconsin (3)], which served mainly urban minority children, was in its ninth year of operation and was recognized by the U.S. branch of the Association Montessori Internationale (AMI/USA) for its good implementation of Montessori principles (4).

Because it was not feasible to randomly assign children to experimental and control educational groups, we designed our study around the school lottery already in place. Both the experimental and the control group had entered the Montessori school lottery; those who were accepted were assigned to the experimental (Montessori) group, and those who were not accepted were assigned to the control (other education systems) group. This strategy addressed the concern that parents who seek to enroll their child in a Montessori school are different from parents who do not. It is crucial to control for

this potential source of bias, because parents are the dominant influence on child outcomes (5).

**Recruitment**

We contacted parents of children who had entered the Montessori school lottery in 1997 and 2003 and invited them to be in the study. All families were offered \$100 for participation.

Because the lottery, which was conducted by the school district, was random, the Montessori and control groups should contain similar children. Ninety percent of consenting parents filled out a demographic survey. Parents from the Montessori and control groups had similar average incomes (\$20,000 to \$50,000 per year) at each student age level. This addressed a concern with a retrospective lottery loser design that the final samples might be different for reasons other than the treatment. Another variable, ethnicity, was not surveyed because parent income contributes more to child outcomes than does ethnicity (6). We were also concerned that requesting ethnicity data would reduce participation in this racially divided city.

Overall, 53 control and 59 Montessori students were studied (table S1). The 5-year-old group included 25 control and 30 Montessori children, and the 12-year-old group included 28 control and 29 Montessori children. Gender balance was imperfect, but gender

did not contribute significantly to any of the differences reported here. Children at the Montessori school were drawn from all six classrooms at the primary level and all four at the upper elementary level. The control children were at non-Montessori schools: 27 public inner city schools (40 children) and 12 suburban public, private/voucher, or charter schools (13 children). Many of the public schools had enacted special programs, such as gifted and talented curricula, language immersion, arts, and discovery learning.

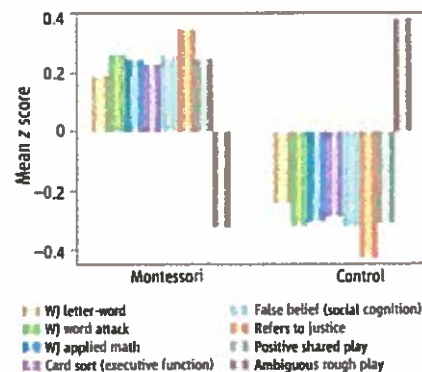
Children in both groups were tested for cognitive/academic and social/behavioral skills that were selected for importance in life, not to examine specific expected effects of Montessori education. Our results revealed significant advantages for the Montessori group over the control group for both age groups.

**Results: 5-Year-Olds**

**Cognitive/Academic Measures.** Seven scales were administered from the Woodcock-Johnson (WJ III) Test Battery (7). Significant differences favoring Montessori 5-year-olds were found on three WJ tests measuring academic skills related to school readiness: Letter-Word Identification, Word Attack (phonological decoding ability), and Applied Problems (math skills) (see chart, left). No difference was expected or found on the Picture Vocabulary test (basic vocabulary) because vocabulary is highly related to family background variables (8). Two WJ tests of basic thinking skills—Spatial Reasoning and Concept Formation—also showed no difference.

Five-year-olds were also tested on executive function, thought to be important to success in school. On one such test, children were asked to sort cards by one rule, switch to a new rule, and (if they did well) then switch to a compound rule. Montessori children performed significantly better on this test. A test of children's ability to delay gratification (a treat) did not indicate statistically significant differences.

**Social/Behavioral Measures.** Children were given five stories about social problems, such as another child hoarding a swing, and were asked how they would solve each problem (9).



**Results for 5-year-olds.** Montessori students achieved higher scores [converted to average z scores (18)] for both academic and behavioral tests.

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Montessori children were significantly more likely (43% versus 18% of responses) to use a higher level of reasoning by referring to justice or fairness to convince the other child to relinquish the object. Observations at the playground during recess indicated Montessori children were significantly more likely to be involved in positive shared peer play and significantly less likely to be involved in rough play that was ambiguous in intent (such as wrestling without smiling).

The False Belief task was administered to examine children's understanding of the mind (10). Recognition that people represent the world in subjective as well as objective ways is a landmark achievement in social cognition (11). Social negotiation and discussion about mental states leads to this advance in children (12). Whereas 80% (significantly more than chance) of the Montessori 5-year-olds passed, the control children were at chance, with 50% passing.

**Results: 12-Year-Olds**

**Cognitive/Academic Measures.** Twelve-year-olds were given 5 minutes to complete a story beginning "\_\_\_\_\_ had the best/worst day at school." The Montessori students' essays were rated as significantly more creative and as using significantly more sophisticated sentence structures (see chart, below). Control and Montessori essays were similar in spelling, punctuation, and grammar. Unlike the 5-year-olds, the 12-year-olds did not perform differently on the WJ tests. This is surprising, because early reading skills normally predict later reading (13). Either the control group had "caught up" by age 12 to the Montessori children, or the 12-year-old Montessori children were not more advanced in these early reading skills when they were 5. If the latter, one possible explanation is that the 12-year-olds started at the school when it was in its third year. The Montessori method relies on peer teaching and modeling, so those who are in the early classes of a new school lack some advantages relative to those who begin later.

**Social/Behavioral Measures.**

As a social skills test, 12-year-olds read six stories about social problems (such as not being asked to a party) and were asked to choose among four responses. Montessori 12-year-olds were significantly more likely to choose the posi-

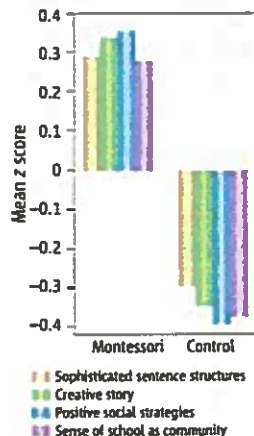
tive assertive response (for example, verbally expressing one's hurt feelings to the host). On a questionnaire regarding their feelings about school, Montessori children indicated having a greater sense of community, responding more positively to items such as, "Students in my class really care about each other" and "Students in this class treat each other with respect."

**Benefits of Montessori Education**

On several dimensions, children at a public inner city Montessori school had superior outcomes relative to a sample of Montessori applicants who, because of a random lottery, attended other schools. 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. At the end of elementary school, Montessori children wrote more creative essays with more complex sentence structures, selected more positive responses to social dilemmas, and reported feeling more of a sense of community at their school.

These findings were obtained with a lottery loser design that provides control for parental influence. Normally parental influence (both genetic and environmental) dominates over influences such as current or past school and day-care environments. For example, in the large National Institute of Child Health and Human Development (NICHD) study of early child care, correlations between parenting

quality and WJ early academic tests had effect sizes comparable to those seen here, whereas school effects were much smaller (5). An evaluation of *Success for All*, considered a highly successful reading intervention, reported a quarter of a standard deviation as its largest effect size (for Word Attack) in a randomized field trial, and stated that it was equal to a 4.69-month advance in reading skills (14). Stronger effects are often found in the first years of pilot programs when researchers are involved in implementation of their own programs (15), termed the "super-realization effect" (16). In our study, the school did not anticipate an evaluation. Especially remarkable outcomes of the Montessori education are the



**Results for 12-year-olds.** Students in the Montessori program wrote more sophisticated and creative stories and showed a more developed sense of community and social skills. Scores were converted to average z scores (18).

social effects, which are generally dominated by the home environment (17).

Future research could improve on the research design here by following lottery participants prospectively and by tracking those who drop out and examining their reasons. It would be useful to replicate these findings in different Montessori schools, which can vary widely. The school involved here was affiliated with AMI/USA, which has a traditional and relatively strict implementation. It would also be useful to know whether certain components of Montessori (e.g., the materials or the opportunities for collaborative work) are associated with particular outcomes.

Montessori education has a fundamentally different structure from traditional education. At least when strictly implemented, Montessori education fosters social and academic skills that are equal or superior to those fostered by a pool of other types of schools.

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18. The z-score conversion was used for the graph to give all tests the same metric. A z score sets the mean (in this case of the entire sample) at 0, one standard deviation above the mean at 1.68, and one standard deviation below the mean at -1.68.
19. Funding was provided by the Jacobs and Cantus Foundations and sabbatical fellowships from the Cattell Foundation and the University of Virginia to A.L.J. DeLoache, B. Detmer, L. Ma, A. Pinkham, R. Tai, and J. van Reet provided helpful comments, and E. Turkheimer provided valuable statistical advice. We thank the Milwaukee schools that participated; the children and their families; and A. Hart, T. Nishida, A. Pinkham, J. van Reet, and B. Rosen.

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"There is no doubt about the power of the Montessori Magnet to attract. They have consistently sustained excited teachers, involved parents, and a wide cross-section of children. They are the first schools to meet their enrollment, and they almost always have huge waiting lists."

Donald Waldrip, Magnet Specialist



## Why The Montessori Education Model?

*You might call it a growing revolution. Close to 160 Montessori public school programs have been identified in the United States. Nearly two-thirds of the schools have waiting lists, and one-third of these have over 200 pupils waiting to enter.*

### *Why are Montessori magnet schools so popular?*

- Montessori achieves results. Magnet school test scores indicate a significant percentage of students scoring in the "high performance" category (77<sup>th</sup> through 99<sup>th</sup> percentiles) in vocabulary, reading, and math.
- Research studies indicate that children of both low and middle socioeconomic levels benefit from Montessori education in the short and long term. (For details of the research, see Dr. Mary Boehnlein, "Montessori Research: Analysis in Retrospect," *The NAMTA Journal*, Vol. 13, No. 3, Summer 1988.)
- A recent research survey by the North American Montessori Teachers' Association (NAMTA) indicates that balanced racial composition has been enhanced by Montessori urban magnet schools. Suburban and urban integration has also been highly successful with Montessori programs.
- Montessori education has a strong preschool component in keeping with federal and state support for early childhood education for the inner city. Public Montessori preschool is eligible for Head Start funding.
- Montessori educators have developed model parent education programs which actively encourage parental support and involvement.
- Montessori education enjoys a good reputation as a private school option with approximately 3000 private Montessori schools in operation in the United States. Because of their reputation and child-centered philosophy, Montessori schools are able to attract families from a variety of backgrounds.
- Montessori curriculum is implemented worldwide and adapts well to multicultural settings. It includes an integrated program of the natural and social sciences for pre-kindergarten through sixth grade.

*In use since 1907, Montessori classrooms are "total environments" containing a beautiful array of high quality, three-dimensional manipulatives which facilitate abstraction through concrete operations. A national and international support network provides a time-tested program with learning materials, curriculum objectives, and teacher training.*



## Why Now ?

### Continuity in Educational Reform

While the clamor for educational reform may seem to have become a platitude, the proliferation of new reform strategies (including testing of both teachers and students) demonstrates that the need for change still exists. The reason why the reform movement that started in the 1960s continues today is perhaps best stated by the American Association for the Advancement of Science (1989): "Quick fixes always fail in education . . ." (p. 154).

Two points almost universally agreed upon by educational reformers are the need for comprehensive approaches to reform and the difficulty of finding true comprehensiveness:

Piecemeal reform measures beget piecemeal effects, if any. At the school district level, reform should be inclusive: all grades, all subject domains, all streams . . . Without a more sweeping approach, change will be constrained by having to fit within the boundaries of class periods, school subjects, sequences, and tracks that themselves may be a large part of the problem.

Nationwide, reform needs to be comprehensive in the sense of addressing all aspects of the system. . . . to make new curricula work, changes must also occur in the preparation of teachers, the content of textbooks and other learning materials, the use of technologies, the nature of testing, and the organization of schools. Furthermore, the changes need to be compatible, lest they cancel each other out. (American Association for the Advancement of Science, 1989, p. 156)

Edward Zigler (one of the founders of Head Start) and Susan Muenchow echo the call for continuity: "From the earliest evaluations of Head Start, it was clear that the program did not last long enough, and the most recent research confirms the same finding" (1992). They go on to recommend that a Head Start-like strategy be deployed for economically disadvantaged children "at least through grade three."

Public school Montessori not only fulfills that recommendation but takes comprehensiveness to a level not currently available by providing a comprehensive developmental continuum from birth to adolescence.

### Parent Involvement

Now more than ever there is an awareness that the school cannot take on the entire responsibility for educating children. Recent research confirms a positive correlation between parent participation in school activities and student achievement (Villegas and Biber, 1987).

The Montessori approach is grounded in parent involvement guided by a philosophy that educates parents in the principles of child development and invites them to participate actively in the child's learning at home and in school. Montessori parent education includes these elements:

- orientation meetings to introduce the program.
- discussion meetings covering the overall curriculum and the unique aspects of a particular classroom.
- classroom open houses hosted by the children.
- discussion groups dealing with childrearing, child psychology, and the home environment.
- observations of the classroom followed by discussions with the teacher.
- regular newsletters including a calendar of events, book reviews, and other school information.

### Permanent Funding

Fragmented funding leads to fragmented implementation. In answer to the Clinton administration's search for creative strategies to fund education, public Montessori programs provide ways to de-categorize funding by combining monies from desegregation initiatives, Chapter 1, Head Start, and the private sector.

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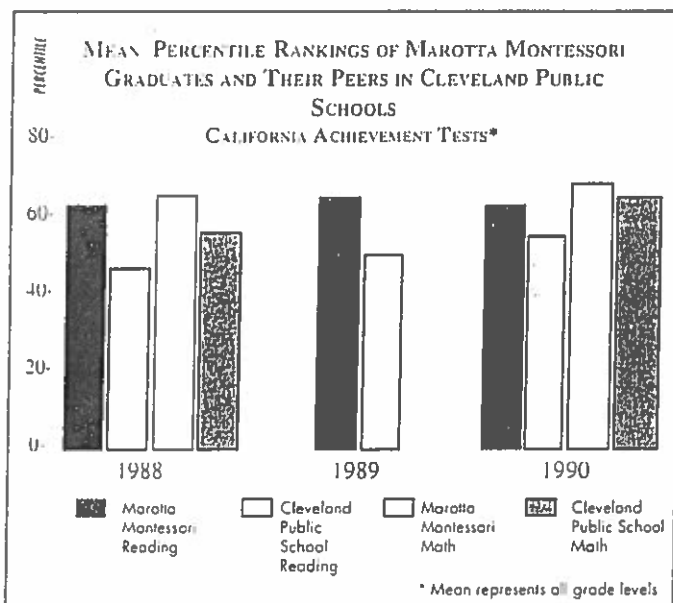




## Research Summary

### Studies in Support of Early-Childhood Montessori

In a recent study by Dr. Carol Takacs (1991), professor of educational psychology at Cleveland State University, graduates of the Montessori Head Start program at Marotta Montessori Schools of Cleveland who had entered the Cleveland Public Schools (CPS) were studied in relation to their CPS peers. California Achievement Test scores for Marotta graduates in grades one through eight were compared with the overall scores of first- through eighth-graders in the Cleveland Public Schools. (No math tests were given in 1989.) As this graph shows, the Montessori-trained students consistently fared better:



More recently, Takacs (1993) found Marotta Montessori graduates far outstripping their CPS peers in eligibility for the gifted program in the Cleveland Public Schools. Overall, in 1991, only about four percent of CPS children qualified for the program by scoring at or above Stanine 7 (seventy-fifth percentile nationally) on the California Achievement Tests, whereas the following percentages (by grade level in 1991) of Marotta graduates qualified:

Grade One	33%
Grade Two	25%
Grade Three	20%
Grade Four	50%
Grade Five	10%
Grade Six	43%
Grade Seven	30%

In addition to the Takacs work, Dr. Mary Maher Boehnlein (1990) reviewed 244 studies of Montessori pedagogy, including twenty-five that focused exclusively on children of low socio-economic status (SES). She found these studies to show overall that "low SES children benefited significantly" from Montessori preschool, even if they attended for less than the full three years. For example, in long-range studies by Merle B. Karnes (1969, 1978, 1983), after just one year of Montessori preschool, low-SES children showed "superior performance on measures of autonomy and curiosity" over low-SES children from other preschool programs (cited in Boehnlein, 1990). Karnes also found that although low-SES children from Montessori preschools showed no significant differences from their non-Montessori peers immediately after the preschool program, in later years, they outstripped these peers in academic competence and achievement as well as attitude toward school. Moreover, "significantly higher numbers of Montessori children" completed school (cited in Boehnlein, 1990).

### Studies in Support of Montessori Elementary Programs

More recent studies confirm these early results and point toward even better results for low-SES children who attend Montessori programs throughout the preschool and elementary years. For instance, Dr. Tim Duax (1989) studied the 1987 and 1988 graduates of MacDowell School, a Milwaukee public-school Montessori program spanning ages four to eleven. Thirty-six percent of these students were eligible for the federal hot-lunch program because of low parental income, and fifty percent were minority. Here are the results of the Duax study (see Table 1):

- The standardized-test scores (Iowa Test of Basic Skills) of eighty-four percent of MacDowell graduates fell above the fiftieth percentile, far above national norms.
- Nationally, twenty-three percent of students scored in the "high achievement" range; of MacDowell graduates, 44.5 percent scored in that range.
- While twenty-three percent of their peers nationally scored in the "low achievement" range, only 12 percent of MacDowell graduates scored in that range.

In addition, in a blind study, Duax (1989) asked twenty-seven middle-school teachers in three middle schools to assess fifteen randomly-selected graduates of MacDowell

in comparison to student peers in the same middle school with no Montessori background. (The fifteen were chosen to reflect the total graduate population of MacDowell in gender, race, and SES factors.) The teachers gave the Montessori-trained sample above-average ratings in relation to their peers on each of the twenty-five characteristics on the survey (such as following directions, turning in work on time, listening attentively, using basic skills, asking provocative questions, and adapting to new situations). The Montessori-trained sample ranked highest on five characteristics: using basic skills, being responsible, showing enthusiasm for class topics, being individualistic, and exhibiting multicultural awareness.

In summary, studies such as those by Takacs, Karnes, and Duax show that Montessori education at both the preschool and elementary levels benefits low-SES children by giving them higher competence in basic skills, a better attitude toward school, and a greater chance of staying in school than their non-Montessori peers possess.

Table 1.

	Stanine	Number of MacDowell Graduates (87 & 88)	MacDowell Percentage	National Norms
High Achievement	9	8	9.5%	4%
	8	9	10.0%	7%
	7	21	25.0%	12%
Mid-range Achievement	6	23	27.1%	17%
	5	19	22.6%	20%
	4	3	3.6%	17%
Low Achievement	3	1	1.2%	12%
	2	0		7%
	1	0		4%

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## Montessori at a Glance

### MONTESSORI: Creating a Paradigm Shift in Education

#### Traditional Classroom

Textbooks  
Pencil and paper  
Worksheets and dittos

Working and learning without  
emphasis on social  
development

Narrow, unit-driven curriculum

Individual subjects

Block time, period lessons

Single-graded classrooms

Students passive, quiet, in desks

Students fit mold of school

Students leave for special help

Product-focused report cards



#### Montessori Environment

Prepared kinesthetic materials with in-  
corporated control of error  
Specially developed reference  
materials

Working and learning matched to the  
social development of the child

Unified, internationally developed cur-  
riculum

Integrated subjects and learning based  
on developmental psychology

Uninterrupted work cycles

Multi-graded classrooms

Students active, talking, with periods of  
spontaneous quiet, freedom to move

School meets needs of students

Special help comes to students

Process-focused assessment, skills  
checklists, mastery benchmarks

*Submitted by Tim Duax*

## Montessori: Common Misconceptions

1. Montessori is just for preschool children.

While the majority of Montessori schools in the United States are preschools, Montessori programs exist at age levels from birth to fourteen.

2. Montessori is just for special learners—the gifted or the learning-disabled.

The methods used in Montessori schools are highly effective with both learning-disabled and gifted learners; the reason for their effectiveness, however, is that the learning environments have been designed to ensure success for all children.

3. Montessori schools are religious.

Many private American Montessori schools do have a religious orientation because it is such a common practice in America for private schools to have religious support. But Montessori itself is not religiously oriented and finds itself quite at home in public settings where religious instruction is inappropriate.

4. Montessori is only for the rich.

This misconception is due to the fact that the American Montessori movement that began in the 1950s was primarily a private preschool movement, supported by tuition. Now, however, Montessori education is available at approximately 160 public schools

5. Children in Montessori classrooms are relatively unsupervised and can "do whatever they want."

Montessori is based on the principle of free choice of **purposeful** activity. If the child is being destructive or is using materials in an aimless way, the teacher will intervene and gently re-direct the child either to more appropriate materials or to a more appropriate use of the material.



Montessori (PreK-8)



COMPREHENSIVE  
SCHOOL  
REFORM

About the Program

Funds

Program Catalog

Criteria

School Sites

Resources

FAQs



IN BRIEF	
Montessori	
<i>Developer</i>	Maria Montessori
<i>Year Established</i>	1907
<i># Schools Served (Jan. 1998)</i>	3,000+
<i>Level</i>	conventionally, ages 3-12 (some ages 0-14)
<i>Primary Goal</i>	to help each child reach his or her fullest potential
<i>Main Features</i>	<ul style="list-style-type: none"> <li>• multi-age groups</li> <li>• self-correcting, manipulative learning materials</li> <li>• open time and free choice of activity</li> <li>• work matched to child's developmental level</li> <li>• interdisciplinary curriculum</li> <li>• learning driven by child's interest</li> </ul>
<i>Results</i>	Montessori students consistently outperform their peers in reading and math; even those who attend only Montessori preschool continue to outscore peers in reading and math into the upper elementary grades
<i>Impact on Instruction</i>	teachers learn and implement a comprehensive, integrated approach to child development and the psychology of learning
<i>Impact on Organization/Staffing</i>	full-time program coordinator; paraprofessional classroom assistants
<i>Impact on Schedule</i>	morning and afternoon blocks of open, uninterrupted work time
<i>Subject-Area Programs Provided by Developer</i>	yes
<i>Students Served</i>	
<i>Title I</i>	yes
<i>English-language learners</i>	yes
<i>Urban</i>	yes
<i>Rural</i>	yes
<i>Parental Involvement</i>	orientations, discussions, open houses, observations, publications
<i>Technology</i>	none required
<i>Materials</i>	specialized learning materials replace textbooks, workbooks, and ditto

## Effective Teaching for Readers Who Struggle

Irene C. Fountas  
Gay Su Pinnell

Teaching readers who struggle is the greatest challenge for literacy educators. In different ways, all teachers face this problem. And the problem does not reside in the children. The fact is that *teaching* must be designed to meet the needs of each child. Effective teaching can lift readers from struggle to success.

The early years of school are important for every child, but for those who find literacy learning difficult, every one of these years is critical. First, they need excellent classroom instruction over the years. But to develop a proficient reading process, some will also need intervention at a critical point (or several points) in their academic careers. Children who fall behind in the first years of school do not benefit fully from classroom instruction. The gap widens over the years as they experience confusion and failure. Schools seeking to close the achievement gap must consider good classroom teaching, multiple layers of intervention, the role of short-term intensive tutoring, and the ongoing development of highly qualified teachers.

We have studied and worked with early intervention for many years. Effective intervention places students in a position to engage in successful processing. A first step is to analyze students' current reading competencies and to place them in texts that they can read successfully (with comprehension and high accuracy) with teacher support. But that is only the beginning. The teaching makes the critical difference in student progress. In the rest of this article, we discuss characteristics of intervention teaching and the structures that help to make it powerful.

Our examination of the research and our experience suggests fifteen keys to effective intervention. We describe these fifteen keys below.

1. *Provide supplementary lessons.* Interventions must supplement, not supplant, effective classroom instruction. When children fall behind, they need "something extra" to make faster progress and catch up to their peers.
2. *Provide frequent lessons.* Struggling readers need a predictable, consistent schedule of instruction. Daily supplemental instruction helps students gain momentum; you can reinforce and build on what was learned the day before.
3. *Keep the teacher/student ratio low.* The effectiveness of individual tutoring is well-documented. When working with small groups, a one to three teacher/student ratio is ideal. Three students provide enough varied conversation, you are able to match their reading levels more close and interact with individuals as needed. We have found it more accelerative to work with three children for half of the school year than to work with six for the entire year.

4. *Provide highly effective short term services.* If the intervention is early and effective, children will not need many years (or even a whole year) of intervention instruction. The layers of intervention should be flexible enough that you can group and regroup students or move from group to individual intervention.
5. *Provide highly structured and systematic lessons.* Effectiveness and efficiency depend on carefully designed instructional frameworks in which all the participants know what to expect and what is expected of them. Lessons should use a sequence of texts that build on each other in many ways—concepts, complexity, word difficulty, and other relevant factors. The lessons structure should include phonics principles, built systematically, but also emphasize comprehension and a great deal of work with continuous text.
6. *Provide fast-paced lessons.* For many struggling readers, lessons involve “slowed down” work and a great deal of boring drill. A fast-paced lesson will engage learners and keep their attention focused on reading and writing.
7. *Focus on comprehension strategies and vocabulary.* Too often, reading becomes a mechanical and tedious task for struggling readers, especially if they are constantly asked to read texts that are too hard. They need supportive teaching to help them think about texts and talk about their thinking. They also need some explicit vocabulary instruction to support their understanding of the content of increasingly challenging texts.
8. *Combine reading and writing.* Using writing in combination with reading is a highly effective way of supporting the growth of both reading and writing skills. Writing can help students extend their understanding of texts that they read. During the process of writing, they learn much about letters, sounds, and how words work.
9. *Make systematic use of phonics.* Very often, struggling readers need to learn the building blocks of words—how words work. Phonics principles should be explicitly introduced and students given the opportunity for “hands on” or kinesthetic practice and application. Students need to meet the same principles again and again and be prompted and reinforced as they apply them in reading and writing.
10. *Develop fluency in reading and writing.* Fluency must be an important goal of intervention lessons. Lessons should include explicit attention to elements of fluency such as phrasing, pausing, appropriate stress on words, and intonation.
11. *Center instruction around high-quality texts.* We have said that texts should be matched to readers’ current abilities, but they must also engage learners. Too often, texts for struggling readers are inferior or just boring and unappealing. Readers who struggle need the same variety and quality as proficient readers.

12. Assess difficulties and monitor progress in valid and reliable ways. Effective instruction is based on excellent assessment. You not only need initial and final assessments, but it is important to systematically and continuously monitor progress and keep practical records that inform your day-to-day teaching. Assessment that involves close observation and recording and analyzing reading behaviors will be most helpful.
13. Connect the intervention to the classroom. The more the intervention lessons are connected to the student's work in the classroom, the more effective they will be. This does not mean reading the same books as expected in classroom instruction or helping the student complete assigned work that is too difficult. It does mean working closely with the classroom teacher, communicating about the child, and providing some work that the student can do independently in the classroom.
14. Connect intervention instruction to students' homes. Children need opportunities to share successes with their families at home and to demonstrate their new learning with competence. Taking books home, and also some well-designed phonics work or writing about reading, will create a link between school and home and promote literacy in homes.
15. Include high quality professional development. We have said that teaching makes the difference, and this means supporting teachers to help them learn from their teaching. Many times, professional development is vague and nonspecific, leaving teachers to apply principles on their own without support. Professional development should be centered on the problems of practice and offer very specific guidance for teacher decision making. At the same time, it must help teachers constantly strengthen their own understanding of the reading/writing processes and expand their ability to observe for behavioral evidence of learning.

Multiple layers of intervention that meet the criteria above have great potential for influencing learning. If we are willing to put systems into place, we can meet the needs of children in today's schools.



## A FRAMEWORK FOR LITERACY INTERVENTION LESSONS

### Odd-Numbered Lesson

#### Text Analysis and Goals

1. Rereading Books
2. Phonics/Word Study
3. Reading a New Book (instructional level text)
  - Introduction
  - Reading with Teacher Support
  - Discussing the Meaning (Evidence of Thinking Within, Beyond, and About the Text)
  - Teaching Point
4. Word Work

Classroom Connection  
Home/School Connection

#### Assessment

Suggestions for Working with English Language Learners  
Professional Development

### Even-Numbered Lesson

1. Rereading and Assessment (reading record)
  2. Phonics/Word Study
  3. Writing about Reading
  4. Reading a New Text (1-2 levels easier than instructional)
    - Introduction
    - Reading with Teacher Support
    - Discussing the Meaning (Evidence of Thinking Within, Beyond, and About the Text)
    - Teaching Point
- Extra Word Work (option)

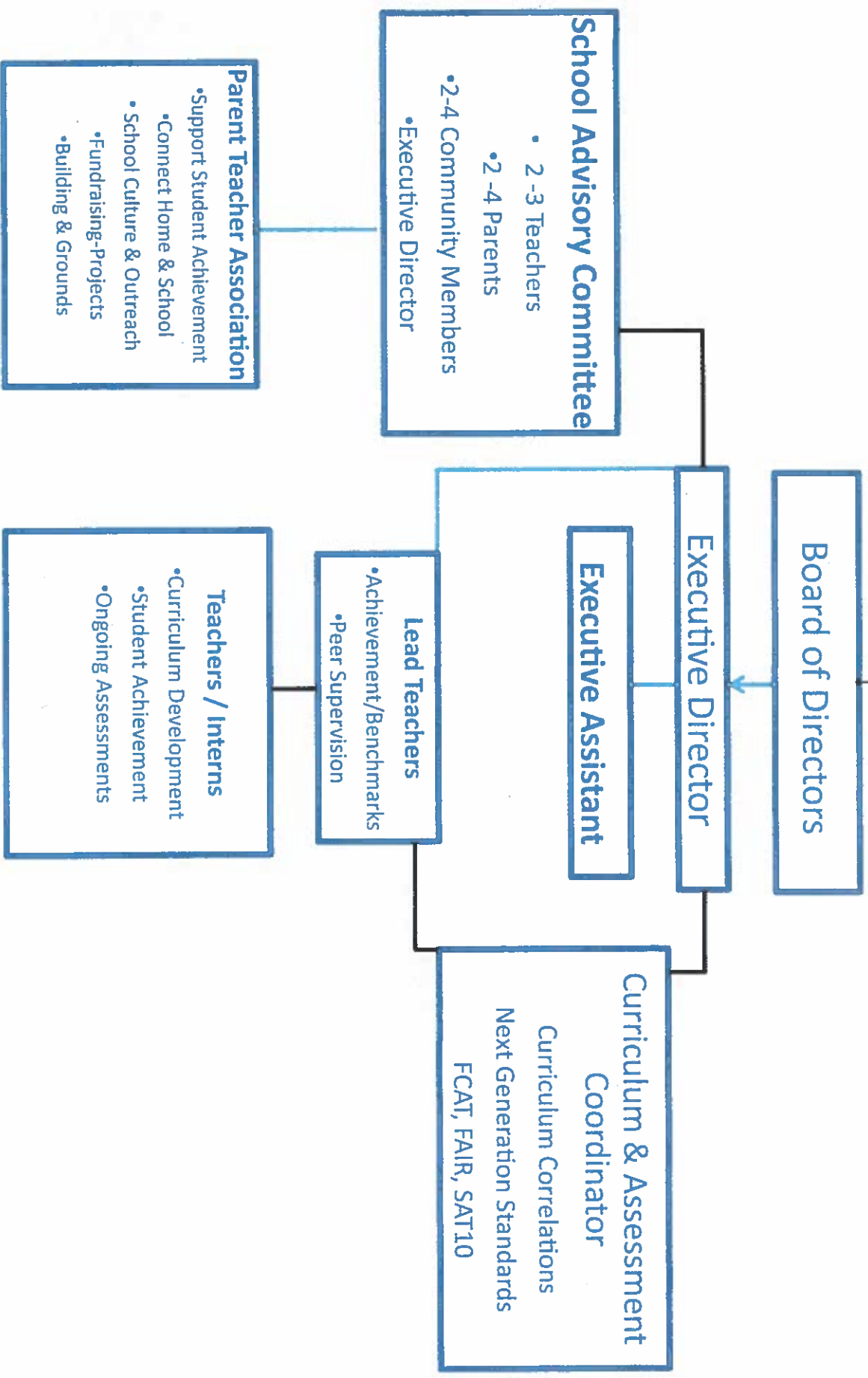
Classroom Connection  
Home/School Connection

#### Assessment

Suggestions for Working with English Language Learners  
Professional Development

## *II. Organizational Plan Exhibits*

# West Orange Montessori Charter Organizational Flow Chart



## **Articles of Incorporation of West Orange Montessori Charter School, Inc.**

The undersigned, acting as sole incorporator of the West Orange Montessori Charter School, Inc. (the "Corporation"), under the Florida Not for Profit Corporation Act, Chapter 617, Florida Statutes, hereby adopts the following Articles of Incorporation for such Corporation:

### **Article I - Name**

The name of the Corporation shall be West Orange Montessori Charter School, Inc.

### **Article II – Principle Office**

The place in this state where the principal office of the Corporation is to be located is 227 South Main Street, Winter Garden, Florida 34787. The location of the principal office shall be subject to change pursuant to bylaws duly adopted by the Corporation.

### **Article III – Statement of Purpose and Powers**

This Corporation is organized exclusively for the purpose of providing and promoting quality Montessori public education as a charter school pursuant to Section 1002.33, Florida Statutes, as hereafter amended. The Corporation shall operate for that educational purpose within the meaning of Section 501(c)(3) of the Internal Revenue Code of 1986, as amended (or the corresponding provisions of any future United States Internal Revenue Law)(hereinafter the "Internal Revenue code").

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.

## **Article VI - Powers**

This Corporation shall have all the powers conferred upon not for profit corporations organized by the Florida Not for Profit Corporation Act, section 617, Florida Statutes, and as the same now exists and as hereafter amended, provided that it shall exercise such powers only in fulfillment of its above-stated purposes, and in compliance with this Article and all provisions of section 501(c)(3) of the Internal Revenue Code.

## **Article V – Members**

The corporation shall not have members, but shall be governed, administered and managed by its board of directors.

## **Article IV – Manner of Election of Directors**

The directors shall be elected in the manner specified in the bylaws of the corporation. Provided, however, that there shall be no less than three (3) directors at all times during the life of the corporation.

## **Article VII – Initial Directors and Officers**

The names of the initial directors are:

1. Thomas Palmer, 404 Mary Ellen Court, Winter Garden
2. Jeffrey Badgley, 827 Irma Avenue, Orlando, Florida 32803
3. Michelle Dulany, 227 South Main Street, Winter Garden, Florida 34787
4. Anya Kalashevski, 3630 1<sup>st</sup> Avenue, Winter Garden
5. Michelle Wood, 1422 Sherbourne Street, Winter Garden

The names of the initial officers are:

1. President, Thomas Palmer, 404 Mary Ellen Court, Winter Garden
2. Vice President, Jeffrey S. Badgley, 827 Irma Avenue, Orlando, Florida 32803
3. Secretary, Michelle Wood, 1422 Sherbourne Street, Winter Garden
4. Treasurer: Michelle Dulany, 227 South Main Street, Winter Garden, Florida 34787

**Article VIII – Initial Registered Agent and Street Address**

The registered agent for the corporation is Jeffrey S. Badgley, 827 Irma Avenue, Orlando, Florida 32803.

**Article IX – Incorporator**

The name and address of the Incorporator is Jeffrey S. Badgley, 827 Irma Avenue, Orlando, Florida 32803.

**Article X– No Private Inurement**

No part of the net earnings of the corporation shall inure to the benefit of, or be distributable to its directors, 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 the purposes set forth in Article Third hereof.

**Article XI - Non-political Activity**

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.

**Article XII – Dissolution**

The Corporation may be dissolved upon the adoption of a plan to dissolve in the manner now or hereafter provided in the Florida Statutes. In the event of dissolution of the Corporation, no liquidating or other dividends and no distribution of the property owned by the Corporation shall be declared or paid to any private individual, but the net assets of the Corporation shall be distributed as follows:

- (1) All liabilities and obligations of the Corporation shall be paid, satisfied and discharged, or adequate provision shall be made therefore;

- (2) Remaining assets shall be distributed to one or more organizations described in Section 501(c)(3) of the Internal Revenue Code, as determined in the plan to dissolve adopted in the manner set for the above in this Article VIII.

**Article XIII – Amendment**

These Articles may be amended in the manner now or hereafter provided in the Florida Statutes.

IN WITNESS WHEREOF, I have hereunto set my hand this \_\_\_\_\_ day of March, 2010.

\_\_\_\_\_  
Jeffrey S. Badgley, Incorporator

**ACCEPTANCE OF APPOINTMENT BY INITIAL REGISTERED AGENT**

THE UNDERSIGNED, having been named in Article VII of the foregoing Articles of corporation as Registered Agent at the office designated therein, hereby accepts such appointment and agrees to act in such capacity. The undersigned hereby states that it is familiar with, and accepts, the obligations set forth in Sections 617.0501, Florida Statutes and the undersigned will further comply with any other provisions of law made applicable to it as Registered Agent of the Corporation.

DATED, this \_\_\_\_\_ day of March, 2010.

REGISTERED AGENT

\_\_\_\_\_  
Jeffrey S. Badgley

**Bylaws  
of  
West Orange Montessori Charter School, Inc.**

**Article 1  
Offices**

**Section 1. Principal Office**

The principal office of the corporation is located in Orange County, State of Florida.

**Article 2  
Nonprofit Purposes**

**Section 1. IRC Section 501(c)(3) Purposes**

This corporation is organized exclusively for one or more of the purposes as specified in Section 501(c)(3) of the Internal Revenue Code, including, for such purposes, the making of distributions to organizations that qualify as exempt organizations under Section 501(c)(3) of the Internal Revenue Code.

**Section 2. Specific Objectives and Purposes**

The specific objectives and purposes of this corporation shall be for the purpose of providing and promoting quality Montessori public education as a charter school pursuant to Section 1002.33, Florida Statutes, as hereafter amended. The Corporation shall operate for that educational purpose within the meaning of Section 501(c)(3) of the Internal Revenue Code of 1986, as amended (or the corresponding provisions of any future United States Internal Revenue Law)(hereinafter the "Internal Revenue code").

**Article 3  
Directors**

**Section 1. Number**



The corporation shall have no less than three (3) directors and collectively they shall be known as the board of directors. The Executive Director will serve as a non-voting ex officio member of the Board of Directors, attending all meetings and reporting to the Board.

### **Section 2. Qualifications**

Directors shall be of the age of majority in this state. Other qualifications for directors of this corporation shall be as follows interest in developing, promoting and maintaining West Orange Montessori Charter School, Inc.

### **Section 3. Powers**

Subject to the provisions of the laws of this state and any limitations in the articles of incorporation and these bylaws relating to action required or permitted to be taken or approved by the members, if any, of this corporation, the activities and affairs of this corporation shall be conducted and all corporate powers shall be exercised by or under the direction of the board of directors.

### **Section 4. Duties**

It shall be the duty of the directors to:

1. Establish policies and procedures that provide for the effective operation of an authentic Montessori K-8 Public School.
2. Recognize, respect and preserve the executive, administrative, and leadership role of the Executive Director-Head of School.
3. Ensure full compliance with all applicable Local, State, and Federal laws, standards and regulations as they pertain to West Orange Montessori Charter School.
4. Perform any and all duties imposed on them collectively or individually by law, by the articles of incorporation, by these bylaws, and the approved Orange County School Board Charter;
5. Appoint and remove, employ and discharge, and, except as otherwise provided in these bylaws, prescribe the duties and fix the compensation, if any, of all officers, agents, and employees of the

- corporation;
6. Supervise all officers, agents, and employees of the corporation to assure that their duties are performed properly;
  7. Meet at such times and places as required by these bylaws;
  8. Register their addresses with the secretary of the corporation, and notices of meetings mailed or telegraphed to them at such addresses shall be valid notices thereof;
  9. Provide an annual report to the Orange County School Board, pursuant to section 109.331(9)(k), Florida Statutes.
  10. To participate in governance training approved by the Florida Department of Education, which training shall include government in the sunshine, conflicts of interest, ethics, and financial responsibility.

#### **Section 5. Term of Office**

Each director shall hold office for a period of three (3) years and until his or her successor is elected and qualifies.

#### **Section 6. Compensation**

Directors shall serve without compensation except that a reasonable fee may be paid to directors for attending regular and special meetings of the board. In addition, they shall be allowed reasonable advancement or reimbursement of expenses incurred in the performance of their duties. Any payments to directors shall be approved in advance in accordance with this corporation's conflict of interest policy, as set forth in Article 9 of these bylaws.

#### **Section 7. Place of Meetings**

Meetings shall be held at the principal office of the corporation unless otherwise provided by the board or at such other place as may be designated from time to time by resolution of the board of directors.

#### **Section 8. Annual Meeting**

An annual meeting of the Board of Directors for the election of Directors and Officers and such other business as may come before the meeting shall

be held in May of each year. Written notice shall be given not less than thirty (30) days nor more than sixty (60) days 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.

### **Section 9. Regular Meetings**

In addition to the Annual Meeting, Regular meetings of the Board of Directors shall be held once a month from September through June, excepting in the month of the Annual Meetings, and at such other times as the Board may, from time to time, determine.

### **Section 10. Special Meetings**

Special meetings of the board of directors may be called by the chairperson of the board, the president, the vice president, the secretary, by any two directors, or, if different, by the persons specifically authorized under the laws of this state to call special meetings of the board. Such meetings shall be held at the principal office of the corporation or, if different, at the place designated by the person or persons calling the special meeting.

### **Section 11. Notice of Meetings**

Notice for all meetings of the Board of Directors will comply with section 286.011, Florida Statutes. Adequate notice of all meetings subject to section 286.011, Florida Statutes, shall be published in the West Orange Times or other paper of local circulation not less than forty-eight (48) hours before any such meeting. Notice of Board Meetings shall be posted on the school's web site.

### **Section 12. Quorum for Meetings**

A quorum shall consist of the majority of the members of the board of directors.

Except as otherwise provided under the articles of incorporation, these bylaws, or provisions of law, no business shall be considered by the board at any meeting at which the required quorum is not present, and the only motion which the chair shall entertain at such meeting is a motion to

adjourn.

### **Section 13. Majority Action as Board Action**

Every act or decision done or made by a majority of the directors present at a meeting duly held at which a quorum is present is the act of the board of directors, unless the articles of incorporation, these bylaws, or provisions of law require a greater percentage or different voting rules for approval of a matter by the board.

### **Section 14. Conduct of Meetings**

Meetings of the board of directors shall be presided over by the President, or in his or her absence, by the vice president of the corporation, or in the absence of each of these persons, by a chairperson chosen by a majority of the directors present at the meeting. The secretary of the corporation shall act as secretary of all meetings of the board, provided that, in his or her absence, the presiding officer shall appoint another person to act as secretary of the meeting.

Meetings shall be governed by Roberts Rules of Order, insofar as such rules are not inconsistent with or in conflict with the articles of incorporation, these bylaws, or with provisions of law.

Pursuant to section 286.011, Florida Statutes, all meetings of the Board of Directors at which official acts are to be taken shall be public meetings open to the public at all times and no resolution, rule, or formal action shall be considered binding except as taken or made at such meeting.

### **Section 15. Vacancies**

Vacancies on the board of directors shall exist (1) on the death, resignation, or removal of any director, and (2) whenever the number of authorized directors is increased.

Any director may resign effective upon giving written notice to the chairperson of the board, the president, the secretary, or the board of directors, unless the notice specifies a later time for the effectiveness of such resignation. No director may resign if the corporation would then be left without a duly elected director or directors in charge of its affairs, except upon notice to the office of the attorney general or other appropriate agency of this state.

Directors may be removed from office, with or without cause, as permitted by and in accordance with the laws of this state.

Unless otherwise prohibited by the articles of incorporation, these bylaws, or provisions of law, vacancies on the board may be filled by approval of the board of directors. If the number of directors then in office is less than a quorum, a vacancy on the board may be filled by approval of a majority of the directors then in office or by a sole remaining director. A person elected to fill a vacancy on the board shall hold office until the next election of the board of directors or until his or her death, resignation, or removal from office.

**Section 16. Meeting Attendance.** Directors are expected to attend all Board Meetings. It shall be the duty of the Secretary of the Board to communicate with any Director who shall have three consecutive absences to ascertain the Director's interest in retaining Board membership. Failure to provide an adequate response may qualify as sufficient cause for removal from the Board of Directors.

#### **Section 17. Non-liability of Directors**

The directors shall not be personally liable for the debts, liabilities, or other obligations of the corporation.

#### **Section 18. Indemnification by Corporation of Directors and Officers**

The directors and officers of the corporation shall be indemnified by the corporation to the fullest extent permissible under the laws of this state.

#### **Section 19. Insurance for Corporate Agents**

Except as may be otherwise provided under provisions of law, the board of directors may adopt a resolution authorizing the purchase and maintenance of insurance on behalf of any agent of the corporation (including a director, officer, employee, or other agent of the corporation) against liabilities asserted against or incurred by the agent in such capacity or arising out of the agent's status as such, whether or not the corporation would have the power to indemnify the agent against such liability under the articles of incorporation, these bylaws, or provisions of law.

## **Article 4 Officers**

### **Section 1. Designation of Officers**

The officers of the corporation shall be a president, a vice president, a secretary, and a treasurer. The corporation may also have a chairperson of the board, one or more vice presidents, assistant secretaries, assistant treasurers, and other such officers with such titles as may be determined from time to time by the board of directors.

### **Section 2. Qualifications**

Any person who is an elected member of the Board of Directors may serve as officer of this corporation.

### **Section 3. Election and Term of Office**

Officers shall be elected by the board of directors, at any time, and each officer shall hold office until he or she resigns or is removed or is otherwise disqualified to serve, or until his or her successor shall be elected and qualified, whichever occurs first.

### **Section 4. Removal and Resignation**

Any officer may be removed, either with or without cause, by the board of directors, at any time. Any officer may resign at any time by giving written notice to the board of directors or to the president or secretary of the corporation. Any such resignation shall take effect at the date of receipt of such notice or at any later date specified therein, and, unless otherwise specified therein, the acceptance of such resignation shall not be necessary to make it effective. The above provisions of this section shall be superseded by any conflicting terms of a contract which has been approved or ratified by the board of directors relating to the employment of any officer of the corporation.

### **Section 5. Vacancies**

Any vacancy caused by the death, resignation, removal, disqualification, or otherwise, of any officer shall be filled by the board of directors. In the event of a vacancy in any office other than that of president, such vacancy may be filled temporarily by appointment by the president until such time as the board shall fill the vacancy. Vacancies occurring in offices of officers appointed at the discretion of the board may or may not be filled as the board shall determine.

### **Section 6. Duties of President**

The president shall be the chief executive officer of the corporation and shall, subject to the control of the board of directors, supervise and control the affairs of the corporation and the activities of the officers. He or she shall perform all duties incident to his or her office and such other duties as may be required by law, by the articles of incorporation, or by these bylaws, or which may be prescribed from time to time by the board of directors. Unless another person is specifically appointed as chairperson of the board of directors, the president shall preside at all meetings of the board of directors and, if this corporation has members, at all meetings of the members. Except as otherwise expressly provided by law, by the articles of incorporation, or by these bylaws, he or she shall, in the name of the corporation, execute such deeds, mortgages, bonds, contracts, checks, or other instruments which may from time to time be authorized by the board of directors.

### **Section 7. Duties of Vice President**

In the absence of the president, or in the event of his or her inability or refusal to act, the vice president shall perform all the duties of the president, and when so acting shall have all the powers of, and be subject to all the restrictions on, the president. The vice president shall have other powers and perform such other duties as may be prescribed by law, by the articles of incorporation, or by these bylaws, or as may be prescribed by the board of directors.

### **Section 8. Duties of Secretary**

The secretary shall:

Certify and keep at the principal office of the corporation the original, or a

copy, of these bylaws as amended or otherwise altered to date.

Keep at the principal office of the corporation or at such other place as the board may determine, a book of minutes of all meetings of the directors, and, if applicable, meetings of committees of directors and of members, recording therein the time and place of holding, whether regular or special, how called, how notice thereof was given, the names of those present or represented at the meeting, and the proceedings thereof.

Ensure that the minutes of meetings of the corporation, any written consents approving action taken without a meeting, and any supporting documents pertaining to meetings, minutes, and consents shall be contemporaneously recorded in the corporate records of this corporation. "Contemporaneously" in this context means that the minutes, consents, and supporting documents shall be recorded in the records of this corporation by the later of (1) the next meeting of the board, committee, membership, or other body for which the minutes, consents, or supporting documents are being recorded, or (2) sixty (60) days after the date of the meeting or written consent.

See that all notices are duly given in accordance with the provisions of these bylaws or as required by law.

Be custodian of the records and of the seal of the corporation and affix the seal, as authorized by law or the provisions of these bylaws, to duly executed documents of the corporation.

Keep at the principal office of the corporation a membership book containing the name and address of each and any members, and, in the case where any membership has been terminated, he or she shall record such fact in the membership book together with the date on which such membership ceased.

Exhibit at all reasonable times to any director of the corporation, or to his or her agent or attorney, on request therefore, the bylaws, the membership book, and the minutes of the proceedings of the directors of the corporation.

In general, perform all duties incident to the office of secretary and such other duties as may be required by law, by the articles of incorporation, or by these bylaws, or which may be assigned to him or her from time to time by the board of directors.

## **Section 9. Duties of Treasurer**



The treasurer shall:

Have charge and custody of, and be responsible for, all funds and securities of the corporation, and deposit all such funds in the name of the corporation in such banks, trust companies, or other depositories as shall be selected by the board of directors.

Receive, and give receipt for, monies due and payable to the corporation from any source whatsoever.

Disburse, or cause to be disbursed, the funds of the corporation as may be directed by the board of directors, taking proper vouchers for such disbursements.

Keep and maintain adequate and correct accounts of the corporation's properties and business transactions, including accounts of its assets, liabilities, receipts, disbursements, gains, and losses.

Exhibit at all reasonable times the books of account and financial records to any director of the corporation, or to his or her agent or attorney, on request therefore.

Render to the president and directors, whenever requested, an account of any or all of his or her transactions as treasurer and of the financial condition of the corporation.

Prepare, or cause to be prepared, and certify, or cause to be certified, the financial statements to be included in any required reports.

In general, perform all duties incident to the office of treasurer and such other duties as may be required by law, by the articles of incorporation of the corporation, or by these bylaws, or which may be assigned to him or her from time to time by the board of directors.

### **Section 10. Compensation**

The members of the Board of Directors shall serve without compensation. Provided, however, the Board may approve reimbursement of out-of-pocket expenses incurred by a Board member for the benefit of the school. Such reimbursement shall be made in accordance with a written reimbursement policy adopted and approved by a majority of the members of the Board.

## **Article 5 Committees**

### **Section 1. Executive Committee**

The board of directors may, by a majority vote of its members, designate an Executive Committee consisting of the Officers and Executive Director. The Board may delegate to such committee the powers and authority of the board in the management of the business and affairs of the corporation, to the extent permitted, and, except as may otherwise be provided, by provisions of law.

By a majority vote of its members, the board may at any time revoke or modify any or all of the executive committee authority so delegated, increase or decrease but not below two (2) the number of the members of the executive committee, and fill vacancies on the Executive Committee from the members of the board. The executive committee shall keep regular minutes of its proceedings, cause them to be filed with the corporate records, and report the same to the board from time to time as the board may require.

### **Section 2. Other Committees**

The corporation shall have such other committees as may from time to time be designated by resolution of the board of directors. These committees may consist of persons who are not also members of the board and shall act in an advisory capacity to the board.

### **Section 3. Meetings and Action of Committees**

Meetings and action of committees shall be governed by, noticed, held, and taken in accordance with the provisions of these bylaws concerning meetings of the board of directors, with such changes in the context of such bylaw provisions as are necessary to substitute the committee and its members for the board of directors and its members, except that the time for regular and special meetings of committees may be fixed by resolution of the board of directors or by the committee. The board of directors may also adopt rules and regulations pertaining to the conduct of meetings of committees to the extent that such rules and regulations are not inconsistent with the provisions of these bylaws.

## **Article 6**

## **Execution of Instruments, Deposits, and Funds**

### **Section 1. Execution of Instruments**

The board of directors, except as otherwise provided in these bylaws, may by resolution authorize any officer or agent of the corporation, including the Executive Director, to enter into any contract or execute and deliver any instrument in the name of and on behalf of the corporation, and such authority may be general or confined to specific instances. Unless so authorized, no officer, agent, or employee shall have any power or authority to bind the corporation by any contract or engagement or to pledge its credit or to render it liable monetarily for any purpose or in any amount.

### **Section 2. Checks and Notes**

Except as otherwise specifically determined by resolution of the board of directors, or as otherwise required by law, checks, drafts, promissory notes, orders for the payment of money, and other evidence of indebtedness of the corporation shall be signed by the treasurer and countersigned by the president of the corporation.

### **Section 3. 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 directors may select.

### **Section 4. Gifts**

The board of directors may accept on behalf of the corporation any contribution, gift, bequest, or devise for the nonprofit purposes of this corporation.

## **Article 7**

### **Corporate Records, Reports, and Seal**

#### **Section 1. Maintenance of Corporate Records**

The corporation shall keep at its principal office:

- a. Minutes of all meetings of directors, committees of the board, and, if this corporation has members, of all meetings of members, indicating the time and place of holding such meetings, whether regular or special, how called, the notice given, and the names of those present and the proceedings thereof;
- b. Adequate and correct books and records of account, including accounts of its properties and business transactions and accounts of its assets, liabilities, receipts, disbursements, gains, and losses;
- c. A record of its members, if any, indicating their names and addresses and, if applicable, the class of membership held by each member and the termination date of any membership;
- d. A copy of the corporation's articles of incorporation and bylaws as amended to date, which shall be open to inspection by the members, if any, of the corporation at all reasonable times during office hours.

## **Section 2. Corporate Seal**

The board of directors may adopt, use, and at will alter, a corporate seal. Such seal shall be kept at the principal office of the corporation. Failure to affix the seal to corporate instruments, however, shall not affect the validity of any such instrument.

## **Section 3. Directors' Inspection Rights**

Every director shall have the absolute right at any reasonable time to inspect and copy all books, records, and documents of every kind and to inspect the physical properties of the corporation, and shall have such other rights to inspect the books, records, and properties of this corporation as may be required under the articles of incorporation, other provisions of these bylaws, and provisions of law.

## **Section 5. Right to Copy and Make Extracts**

Any inspection under the provisions of this article may be made in person or by agent or attorney and the right to inspection shall include the right to

copy and make extracts.

### **Section 6. Periodic Report**

The board shall cause an annual or periodic report required under law to be prepared and delivered to an office of this state or to the members, if any, of this corporation, to be so prepared and delivered within the time limits set by law.

## **Article 8 IRC 501(c)(3) Tax Exemption Provisions**

### **Section 1. Limitations on Activities**

No substantial part of the activities of this corporation shall be the carrying on of propaganda, or otherwise attempting to influence legislation (except as otherwise provided by Section 501(h) of the Internal Revenue Code), and this 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 provisions of these bylaws, this corporation shall not carry on any 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 (b) by a corporation, contributions to which are deductible under Section 170(c)(2) of the Internal Revenue Code.

### **Section 2. Prohibition Against Private Inurement**

No part of the net earnings of this corporation shall inure to the benefit of, or be distributable to, its members, directors or 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 the purposes of this corporation.

### **Section 3. Distribution of Assets**

Upon the dissolution of this corporation, its assets remaining after payment, or provision for payment, of all debts and liabilities of this corporation,

shall be distributed for one or more exempt purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code or shall be distributed to the federal government, or to a state or local government, for a public purpose. Such distribution shall be made in accordance with all applicable provisions of the laws of this state.

#### **Section 4. Private Foundation Requirements and Restrictions**

In any taxable year in which this corporation is a private foundation as described in Section 509(a) of the Internal Revenue Code, the corporation 1) shall distribute its income for said period at such time and manner as not to subject it to tax under Section 4942 of the Internal Revenue Code; 2) shall not engage in any act of self-dealing as defined in Section 4941(d) of the Internal Revenue Code; 3) shall not retain any excess business holdings as defined in Section 4943(c) of the Internal Revenue Code; 4) shall not make any investments in such manner as to subject the corporation to tax under Section 4944 of the Internal Revenue Code; and 5) shall not make any taxable expenditures as defined in Section 4945(d) of the Internal Revenue Code.

### **Article 9 Conflict of Interest and Compensation Approval Policies**

#### **Section 1. Purpose of Conflict of Interest Policy**

The purpose of this conflict of interest policy is to protect this tax-exempt corporation's interest when it is contemplating entering into a transaction or arrangement that might benefit the private interest of an officer or director of the corporation or any "disqualified person" as defined in Section 4958(f)(1) of the Internal Revenue Code and as amplified by Section 53.4958-3 of the IRS Regulations and which might result in a possible "excess benefit transaction" as defined in Section 4958(c)(1)(A) of the Internal Revenue Code and as amplified by Section 53.4958 of the IRS Regulations. This policy is intended to supplement but not replace any applicable state and federal laws governing conflict of interest applicable to nonprofit and charitable organizations.

#### **Section 2. Definitions**

- a. **Interested Person.** Any director, principal officer, member of a committee with governing board delegated powers, or any other person who is a "disqualified person" as defined in Section 4958(f)(1) of the Internal Revenue Code and as amplified by Section 53.4958-3 of the IRS Regulations, who has a direct or indirect financial interest, as defined below, is an interested person.
- b. **Financial Interest.** A person has a financial interest if the person has, directly or indirectly, through business, investment, or family:
1. An ownership or investment interest in any entity with which the corporation has a transaction or arrangement;
  2. A compensation arrangement with the corporation or with any entity or individual with which the corporation has a transaction or arrangement; or
  3. A potential ownership or investment interest in, or compensation arrangement with, any entity or individual with which the corporation is negotiating a transaction or arrangement.

Compensation includes direct and indirect remuneration as well as gifts or favors that are not insubstantial.

A financial interest is not necessarily a conflict of interest. Under Section 3, paragraph B, a person who has a financial interest may have a conflict of interest only if the appropriate governing board or committee decides that a conflict of interest exists.

### **Section 3. Conflict of Interest Avoidance Procedures**

- a. **Duty to Disclose.** In connection with any actual or possible conflict of interest, an interested person must disclose the existence of the financial interest and be given the opportunity to disclose all material facts to the directors and members of committees with governing board delegated powers considering the proposed transaction or arrangement.
- b. **Determining Whether a Conflict of Interest Exists.** After disclosure of the financial interest and all material facts, and after any discussion with the interested person, he/she shall leave the governing board or committee meeting while the

determination of a conflict of interest is discussed and voted upon. The remaining board or committee members shall decide if a conflict of interest exists.

- c. **Procedures for Addressing the Conflict of Interest.** An interested person may make a presentation at the governing board or committee meeting, but after the presentation, he/she shall leave the meeting during the discussion of, and the vote on, the transaction or arrangement involving the possible conflict of interest.

The chairperson of the governing board or committee shall, if appropriate, appoint a disinterested person or committee to investigate alternatives to the proposed transaction or arrangement.

After exercising due diligence, the governing board or committee shall determine whether the corporation can obtain with reasonable efforts a more advantageous transaction or arrangement from a person or entity that would not give rise to a conflict of interest.

If a more advantageous transaction or arrangement is not reasonably possible under circumstances not producing a conflict of interest, the governing board or committee shall determine by a majority vote of the disinterested directors whether the transaction or arrangement is in the corporation's best interest, for its own benefit, and whether it is fair and reasonable. In conformity with the above determination, it shall make its decision as to whether to enter into the transaction or arrangement.

- d. **Violations of the Conflicts of Interest Policy.** If the governing board or committee has reasonable cause to believe a member has failed to disclose actual or possible conflicts of interest, it shall inform the member of the basis for such belief and afford the member an opportunity to explain the alleged failure to disclose.

If, after hearing the member's response and after making further investigation as warranted by the circumstances, the governing board or committee determines the member has failed to disclose an actual or possible conflict of interest, it shall take appropriate disciplinary and corrective action.



#### **Section 4. Records of Board and Board Committee Proceedings**

The minutes of meetings of the governing board and all committees with board delegated powers shall contain:

- a. The names of the persons who disclosed or otherwise were found to have a financial interest in connection with an actual or possible conflict of interest, the nature of the financial interest, any action taken to determine whether a conflict of interest was present, and the governing board's or committee's decision as to whether a conflict of interest in fact existed.
- b. The names of the persons who were present for discussions and votes relating to the transaction or arrangement, the content of the discussion, including any alternatives to the proposed transaction or arrangement, and a record of any votes taken in connection with the proceedings.

#### **Section 5. Compensation Approval Policies**

A voting member of the governing board who receives compensation, directly or indirectly, from the corporation for services is precluded from voting on matters pertaining to that member's compensation.

A voting member of any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from the corporation for services is precluded from voting on matters pertaining to that member's compensation.

No voting member of the governing board or any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from the corporation, either individually or collectively, is prohibited from providing information to any committee regarding compensation.

When approving compensation for directors, officers and employees, contractors, and any other compensation contract or arrangement, in addition to complying with the conflict of interest requirements and policies contained in the preceding and following sections of this article as well as the preceding paragraphs of this section of this article, the board or a duly constituted compensation committee of the board shall also comply with the following additional requirements and procedures:

- a. the terms of compensation shall be approved by the board or compensation committee prior to the first payment of compensation;

b. all members of the board or compensation committee who approve compensation arrangements must not have a conflict of interest with respect to the compensation arrangement as specified in IRS Regulation Section 53.4958-6(c)(iii), which generally requires that each board member or committee member approving a compensation arrangement between this organization and a "disqualified person" (as defined in Section 4958(f)(1) of the Internal Revenue Code and as amplified by Section 53.4958-3 of the IRS Regulations):

1. is not the person who is the subject of the compensation arrangement, or a family member of such person;
2. is not in an employment relationship subject to the direction or control of the person who is the subject of the compensation arrangement;
3. does not receive compensation or other payments subject to approval by the person who is the subject of the compensation arrangement;
4. has no material financial interest affected by the compensation arrangement; and
5. does not approve a transaction providing economic benefits to the person who is the subject of the compensation arrangement, who in turn has approved or will approve a transaction providing benefits to the board or committee member.

c. the board or compensation committee shall obtain and rely upon appropriate data as to comparability prior to approving the terms of compensation. Appropriate data may include the following:

1. compensation levels paid by similarly situated organizations, both taxable and tax-exempt, for functionally comparable positions. "Similarly situated" organizations are those of a similar size, purpose, and with similar resources;
2. the availability of similar services in the geographic area of this organization;
3. current compensation surveys compiled by independent firms;
4. actual written offers from similar institutions competing for the services of the person who is the subject of the compensation

arrangement;

As allowed by IRS Regulation 4958-6, if this organization has average annual gross receipts (including contributions) for its three prior tax years of less than \$1 million, the board or compensation committee will have obtained and relied upon appropriate data as to comparability if it obtains and relies upon data on compensation paid by three comparable organizations in the same or similar communities for similar services.

- d. the terms of compensation and the basis for approving them shall be recorded in written minutes of the meeting of the board or compensation committee that approved the compensation. Such documentation shall include:
1. the terms of the compensation arrangement and the date it was approved;
  2. the members of the board or compensation committee who were present during debate on the transaction, those who voted on it, and the votes cast by each board or committee member;
  3. the comparability data obtained and relied upon and how the data was obtained;
  4. If the board or compensation committee determines that reasonable compensation for a specific position in this organization or for providing services under any other compensation arrangement with this organization is higher or lower than the range of comparability data obtained, the board or committee shall record in the minutes of the meeting the basis for its determination;
  5. If the board or committee makes adjustments to comparability data due to geographic area or other specific conditions, these adjustments and the reasons for them shall be recorded in the minutes of the board or committee meeting;
  6. any actions taken with respect to determining if a board or committee member had a conflict of interest with respect to the compensation arrangement, and if so, actions taken to make sure the member with the conflict of interest did not affect or participate in the approval of the transaction (for example, a notation in the records that after a finding of conflict of interest by a member, the member with the conflict of interest

was asked to, and did, leave the meeting prior to a discussion of the compensation arrangement and a taking of the votes to approve the arrangement);

7. The minutes of board or committee meetings at which compensation arrangements are approved must be prepared before the later of the date of the next board or committee meeting or 60 days after the final actions of the board or committee are taken with respect to the approval of the compensation arrangements. The minutes must be reviewed and approved by the board and committee as reasonable, accurate, and complete within a reasonable period thereafter, normally prior to or at the next board or committee meeting following final action on the arrangement by the board or committee.

#### **Section 6. Annual Statements**

Each director, principal officer, and member of a committee with governing board delegated powers shall annually sign a statement which affirms such person:

- a. has received a copy of the conflicts of interest policy;
- b. has read and understands the policy;
- c. has agreed to comply with the policy; and
- d. understands the corporation is charitable and in order to maintain its federal tax exemption it must engage primarily in activities which accomplish one or more of its tax-exempt purposes.

#### **Section 7. Periodic Reviews**

To ensure the corporation operates in a manner consistent with charitable purposes and does not engage in activities that could jeopardize its tax-exempt status, periodic reviews shall be conducted. The periodic reviews shall, at a minimum, include the following subjects:

- a. Whether compensation arrangements and benefits are reasonable, based on competent survey information, and the result of arm's-length bargaining.
- b. Whether partnerships, joint ventures, and arrangements with management organizations conform to the

corporation's written policies, are properly recorded, reflect reasonable investment or payments for goods and services, further charitable purposes, and do not result in inurement, impermissible private benefit, or in an excess benefit transaction.

### **Section 8. Use of Outside Experts**

When conducting the periodic reviews as provided for in Section 7, the corporation may, but need not, use outside advisors. If outside experts are used, their use shall not relieve the governing board of its responsibility for ensuring periodic reviews are conducted.

## **Article 10 Amendment of Bylaws**

### **Section 1. Amendment**

Subject to the power of the members, if any, of this corporation to adopt, amend, or repeal the bylaws of this corporation and except as may otherwise be specified under provisions of law, these bylaws, or any of them, may be altered, amended, or repealed and new bylaws adopted by approval of the board of directors.

## **Article 11 Construction and Terms**

If there is any conflict between the provisions of these bylaws and the articles of incorporation of this corporation, the provisions of the articles of incorporation shall govern.

Should any of the provisions or portions of these bylaws be held unenforceable or invalid for any reason, the remaining provisions and portions of these bylaws shall be unaffected by such holding.

All references in these bylaws to the articles of incorporation shall be to the articles of incorporation, articles of organization, certificate of incorporation, organizational charter, corporate charter, or other founding document of this corporation filed with an office of this state and used to establish the legal existence of this corporation.

All references in these bylaws to a section or sections of the Internal Revenue Code shall be to such sections of the Internal Revenue Code of 1986 as amended from time to time, or to corresponding provisions of any future federal tax code.

**ADOPTION OF BYLAWS**

We, the undersigned, are all of the initial directors or incorporators of this corporation, and we consent to, and hereby do, adopt the foregoing bylaws, consisting of \_\_\_\_\_ preceding pages, as the bylaws of this corporation.

Dated: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## MICHELLE DULANY

227 South Main Street, Winter Garden, Florida, 34787

• [michelle.dulany@gmail.com](mailto:michelle.dulany@gmail.com)

**Forward-thinking school administrator, project manager, teacher, and entrepreneur.**

### EXPERIENCE

- ◆ **FOUNDED, CURRENTLY DIRECTING ALL ASPECTS OF OPERATIONS FOR WEST ORANGE MONTESSORI SCHOOL 2007 – PRESENT.**
- + **Founded and directed academic and business operations for Midcoast Montessori School 1999 – 2007.**
  - ◆ Built annual enrollments of up to 56 children ages 3 to 9, generating gross revenues of up to \$.3 million.
  - ◆ Researched demographics, prepared a successful business plan, purchased a building and contracted for renovations, and outfitted the school with learning resource materials.
  - ◆ Developed school policies, procedures, and schedules. As head teacher, direct the development of current and relevant curricula at each grade level.
  - ◆ Hire and supervise teaching staff. Evaluate job performance and foster staff professional development.
  - ◆ Manage day-to-day school operations and employ an effective marketing plan to generate enrollment.
  - ◆ Ensure full compliance with government regulations, good safety practices, and Montessori principles. Working toward full accreditation through the Montessori School Accreditation Commission.
- + **Planned and executed the opening of a new, private school for 130 students in grades K-12, and served as its inaugural principal.**
  - ◆ Analyzed area demographics to forecast facilities and staff requirements.
  - ◆ Prepared the initial budget; selected and ordered all textbooks and reference materials, classroom and office furnishings, and start-up supplies.
  - ◆ Defined school policy, mission, and vision. Wrote student, parent, and teacher handbooks.
  - ◆ Selected and tailored the entire curriculum; interviewed and hired faculty.
  - ◆ Was instrumental in a school's successful re-accreditation effort.
    - Performed extensive long-range planning, drafted amended policies, developed plans of action and milestones and delegated specific responsibilities to faculty and staff. Monitored task completion.
- + **Taught at the elementary school, secondary school, and university levels.**
  - ◆ Managed classes of up to 45 students for children and young adults ranging in age from 5 to 20.
  - ◆ Taught all topic areas in the elementary school curriculum, as well as life science and study skills at the middle school level, and art history to university students.
    - Taught an entire course as teaching assistant for a professor on sabbatical.
  - ◆ Developed curricula, lesson plans, and learning materials; prepared and graded exams. Provided in-service training to other teachers on curriculum development.

### EMPLOYMENT

- + **Founder/Director/Head Teacher** West Orange Montessori School, Winter Garden, FL, 2007-present.
- + **Founder/Director/Head Teacher** of Midcoast Montessori School, Bath, ME, 1999 – 2007.
- + **Teacher** (grades 2 and 3 combined), Seekonk Academy, Seekonk, MA, 1996 – 97.
- + **Teacher** (grade 7 life science), Emmanuel School, Manassas, VA, 1995 – 96.
- + **Principal** (elementary school), Living Faith Academy, Manassas, VA, 1992 – 95.

### EDUCATION AND CERTIFICATION

- + **M.A.** (Education), Oral Roberts Univ., Tulsa, OK, 1996. K-12 School Administration degree concentration.
- + **B.F.A.** (minor in Literature), *magna cum laude*, Colby-Sawyer College, New London, NH, 1984.
  - ◆ Class Salutatorian. Only two-time recipient in school history of Edith B. Long art scholarship.
- + **Certification:** Montessori Teacher (Primary (3 – 6 yrs.) and Elementary (6 – 12 yrs.)  
American Montessori Society.

## *Curriculum Vitae*

Jeffrey Scott Badgley  
827 Irma Avenue  
Orlando, FL 32803

### **Primary Practice Areas:**

Personal injury, professional negligence, bankruptcy, civil rights, real estate law, business litigation,

### **Education:**

- University of Florida, B.A., Philosophy (with high honors, 1983)
- University of Florida, J.D. (with honors 1986)
  - Order of the Barristers
  - Florida Moot Court Team
  - Florida Mock Trial Team

### **Bar Admissions:**

- Florida Bar, 1986 (member, Trial Lawyers section; member, Real Property Probate and Trust Law section)
- United States District Court, 1988
- United States Court of Appeals, Eleventh Circuit, 1987
- Supreme Court of the United States of America, 1995

### **Professional Organizations:**

- National Association of Consumer Bankruptcy Attorneys, 2010



- Central Florida Bankruptcy Law Association, 2010
- Orange County Bar Association, 1988 to present
- The Florida Civil Procedure Rules Committee, 2003-2006
- The Florida Defense Lawyers Association, 1982 – 1999, 2001 – 2006
- Central Florida Inns of Court

### **Professional Experience:**

*The Badgley Law Group*, August 2009 to present, sole owner. Personal injury, bankruptcy, real estate litigation, business litigation, civil rights.

*Anderson & Badgley*, August, 2006 to August 2009. Two partner law firm practicing real estate, commercial law, civil litigation, personal injury, professional negligence.

*Alvarez, Sambol, Winthrop & Madson, P.A.*, partner. November 2002 to present. Practice in medical and professional negligence, business liability and commercial litigation.

*Cohen, Jayson, and Foster, P.A.* Tampa, Florida. October 1999 to October 2002. Practiced exclusively plaintiff medical malpractice litigation.

*Sanders, McEwan, Martinez, Luff & Dukes, P.A.*, partner. February 1992 to October 1999. Practice in general liability insurance defense, medical and legal malpractice, and commercial litigation.

*Akerman, Senterfitt & Eidson*, associate. February 1988 to February 1992. Practiced in all areas of commercial litigation.

Law Clerk, Judge Melvin Orfinger, Fifth District Court of Appeal; June 1986 to February 1988.

Criminal Clinic Internship, Public Defender's Office, West Palm Beach, Florida.

## Published Papers:

- "Subpoenaed for Deposition? Proceed with Caution,"* Florida Medical Business, Vol. 18, No. 17, September 2004;
- "Using Medical Literature on Direct Examination to Win the 'Battle of the Experts',"* The Florida Bar Journal, Vol. LXXVII, No. 5, May 2003;
- "The Ups and Downs of Defending a Recreational Dive Injury Case,"* The Medlaw Update, Newsletter of the Medical Liability Committee, Defense Research Institute, Winter 1999;
- "Doctors and Depositions, Part II,"* Central Florida Physician, Orange County Medical Society, December 1997;
- "Doctors and Depositions: Florida Supreme Court Defines Limits,"* Central Florida Physician, Orange County Medical Society, November 1996;
- "Collection of Defendant's Judgment for Costs of Attorneys' Fees in Wrongful Death Actions: Is There Light at the End of the Tunnel?"* Trial Advocate Quarterly, Florida Defense Lawyers Association, October, 1993;
- "Court Rules HMO's May Not Interfere with Physician/Patient Relationship,"* Central Florida Physician, Orange County Medical Society, March, 1993, reprinted May, 1996;
- "Repossession and Replevin in Florida,"* CLE publication Foreclosure and Repossession in Florida, Lorman Education Services, September 20, 1990, with Joseph E. Foster, Esquire;
- "Wharfside II: The Supreme Court Opens the Door to Recovery of Lost Profits,"* The Briefs, Orange County Bar Association, January, 1990.

## **Lectures given:**

Jury Selection: What you can do, and what you can't do," Sponsored by Lorman Education Systems, January 31, 2006

Amendments to Chapter 766, presentation to management of Florida Physicians Insurance Company during annual summit, August 2007

Trial Exhibits, Young Lawyers Seminar, sponsored by Florida Defense Lawyers, September 23, 1999, Adams Mark Hotel, Daytona Beach, Florida;

Florida Law of Privilege, "Basic Evidence," Seminar, sponsored by Florida Bar Continuing Legal Education Committee and the Young Lawyers Division, January 10, 1997, Airport Marriott Hotel, Tampa, Florida;

Florida Law of Privilege, "Basic Evidence," Seminar, sponsored by Florida Bar Continuing Legal Education Committee and the Young Lawyer Division, January 9, 1997, Radisson Mark Hotel, Miami, Florida;

Institutional Operations and Risk Management, Health Law Section of the Florida Bar, 1996 Board Certification Examination Review Course, April 20, 1996, Hyatt Regency Orlando International Airport;

AIDS and the Florida Physician, Orlando Regional Medical Center, "Grand Rounds," Lecture Series, June 1993, July 1993, November 1993, December 1993, January 1996;

ERISA and Medical Malpractice, Florida Physicians Insurance Company, 1995 Defense Counsel Conference, July 14, 1995;

Overview of Medical Discovery Provided by Florida Law, Orange County Bar Association, Discovery from Physicians Seminar, May 25, 1994;

Risk Management for Physicians, Orlando Regional Medical Center, "Grand Rounds," Lecture Series, July 1992, November 1992.

## **Reported Cases:**

*ATC International, Inc., v. Alarm Products distributors World Wide, Inc.*, 991 So.2d 872 (Fla. 5<sup>th</sup> DCA 2008 (PCA)

*Twelfth Avenue Investments, Inc., v. Smith*, 979 So.2d 1216 (Fla. 4<sup>th</sup> DCA 2008)

*Torrey v. Leesburg Regional Medical Center*, 731 So.2d 748 (Fla. 5<sup>th</sup> DCA 1999), *reversed*, 769 So.2d 1040 (Fla. 2000)

*Garcia v. Psychiatric Institutes of America, Inc.*, 693 So. 2d 66 (Fla. 5<sup>th</sup> DCA 1997)

*Schlapper v. Maurer*, 687 So.2d 982 (Fla. 5<sup>th</sup> DCA 1997)(appeal counsel only)

*A.J. Stanton, Jr., P.A. v. Ivey*, 645 So.2d 1050 (Fla. 5<sup>th</sup> DCA 1994)

*Pomeranc, v. Winn-Dixie Stores, Inc.*, 598 So.2d 103 (Fla. 5<sup>th</sup> DCA 1992)

## **Personal:**

- Born in Gainesville, Florida, February 17, 1961
- Married to Charlotte Anne Klein
- Three children: Cameron Nicholas Badgley (DOB:7/7/04); Samuel Jefferson Badgley (6/16/05); Zoey-Mae Julia (DOB 12/19/08)
- Hobbies: Playing piano, guitar; reading; archery; kayaking; camping



July 16, 2010

To Whom it May Concern,

As founder and Principal of Crabtree Ink Ad Agency, as well as a native to the area, it has been exciting to see the Cultural Arts come alive in Winter Garden. With the opening of the Garden Theatre and the Crealdé School of Art extension, at the Winter Garden Jessie Brock Rec Center, these Art programs are on a path to becoming more of a cornerstone for the area.

However, while these two institutions have added a lot to this local community, there are still so many of the arts being cut from public school system each-and-every year.

Therefore, it is refreshing to know that schools like the West Orange Montessori Charter School, are still supporting these similar art programs that led me into the art field, that now has become my career.

I would ask that you support West Orange Montessori Charter School to continue to Cultivate the Arts for many generations to come.

Sincerely,

A handwritten signature in black ink, appearing to read "Andy Crabtree", with a long horizontal line extending to the right.

Andy Crabtree  
Principal/Owner, Crabtree Ink

*Make a lasting impression. Put it in Ink!*

July 14, 2010

To Whom It May Concern:

I am a proud parent of two students of West Orange Montessori School. Their incredible educational experience with that school has motivated me to work as a member of the founding board of West Orange Montessori Charter School. Our mission is to create a new charter school to provide publicly available Montessori education to the citizens of Orange County. I am an attorney in private practice. I have counseled and represented businesses, large and small, in the Central Florida area for over two decades. I have already dedicated significant time to creating the legal foundation to make West Orange Montessori Charter School a reality. I will continue to provide my time and legal experience to working with the founding board to transition into the first operational board. I will ensure that the charter school follows the proper legal path to move towards a fully functioning educational institution, operating as a charter school and a 501(c)3 not for profit corporation.

Jeffrey S. Badgely

## Thomas B. Palmer

404 Mary Ellen Court, Winter Garden, FL 34787  
(407) 716-3020 [thomasboydpalmer@earthlink.net](mailto:thomasboydpalmer@earthlink.net)

### QUALIFICATIONS

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Seventeen years of Construction Management, Design/Build, and Real Estate Development experience including Office Buildings, Warehouse/Distribution, Educational K-12, Parks and Sports Stadiums, Hi-rise to 40 stories, Semi-Conductor Clean Rooms, Petrochemical Refineries, Automotive and General Manufacturing Plants, Food & Beverage Plants, FDOT Facilities and Government Institutions. Proficient in AutoCAD, Primavera SureTrak and Microsoft Project.

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### EDUCATION

1993 Master of Building Construction, University of Florida  
1990 Bachelor of Architecture, University of Florida

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### PROFESSIONAL EXPERIENCE

2010 – Present **Walt Disney World, Lake Buena Vista, Florida**  
**Architectural Design Manager**  
Solicit architects and manage their work according to WDW façade and roofing requirements.

2009 – Present **ITT Technical Institute, Lake Mary, Florida**  
**Adjunct Professor, Project Management and Construction Technology**  
Part time instructor of estimating, scheduling, and capstone design courses.

2007 – 2009 **Panattoni Construction, Orlando, Florida**  
**Project Manager**  
Executed multiple Design/Build projects from concept to completion.  
IKEA, Tampa, FL. 36 acre design/build site re-development. Demolition of a 360,000 SF warehouse, remediation of contaminated soils, vibro-compacted stone columns, and FDOT roadway improvements

2004 – 2007 **The Collage Companies, Lake Mary, Florida**  
**Project Manager / Superintendent**  
Lynx Operations Center, Orlando, Florida. On-site management of a \$30M bus maintenance facility including a 100,000 SF Maintenance Building, a 40,000 SF two-story office and Fuel/Wash systems.

2002 – 2004 **Polk County Public Schools, Haines City, Florida.** Instructor at Daniel Jenkins Academy.

2001 – 2002 **Rodda Construction Company, Lakeland, Florida**  
**Project Manager**  
Marchant Stadium, Lakeland, FL \$10M major structural and programmatic renovation.  
City Hall Renovation, Frostproof, FL, City office build-out within the Historic Frostproof Elementary.

2000 – 2001 **Beers / Skanska, Orlando, FL**  
**Project Manager**  
Setai Tower Residences, Miami Beach, FL \$90M, 40-story, luxury beachfront condominium.  
Infineon Office Building, Richmond, VA, On-site management of a 120,000 SF four story office.  
Orange County School Board, Orlando, Florida. Preconstruction manager for multiple concurrent projects.

1993 – 2000 **Fluor Daniel, Greenville, South Carolina**  
**Contract Manager** Aberdeen, Washington. \$130M, 21 building campus and site infrastructure.  
**Assistant Project Manager** Intel Corporation, Hillsboro, Oregon. \$120M clean room build-out.  
**Lead Estimator** Lockheed Martin, Atlanta, GA. Design/build facilities upgrades and expansion.  
Mercedes Benz, 6<sup>th</sup> of October City, Egypt. E-class assembly plant conceptual development estimate.  
Freightliner, Gaffney, South Carolina. Design/build truck assembly plant axle-line Expansion.  
**Superintendent** Mercedes Benz, Tuscaloosa, Alabama. 1,200,000 SF M-class production facility.  
**Project Scheduler** Spherelene, Lake Charles, LA. Polyethylene production facility.

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### AWARDS / CERTIFICATIONS

2009 OSHA 10 hour Training / Red Cross CPR and First Aid Training.  
2008 LEED Accredited Professional. Member of LEED ND Correspondence Committee.  
2005 State of Florida, Certified General Contractor – CGC 1509869.  
1985 Eagle Scout, Boy Scouts of America.

July 26, 2010

To Whom It May Concern,

I offered my services as a founding board member to West Orange Montessori Charter School with great enthusiasm and the goal of helping to create one small part of that better world of which we often dream. I am proud to be involved with a dedicated and well rounded team. Our Board possesses a unique balance of both business acumen as well as expertise in pedagogy.

During our many meetings to carry out the hard work that any worthwhile endeavor demands, we have learned to appreciate each other's talents and have forged strong bonds. Our team is creating an identity for our school founded in the joyous wonder of learning, a sharing of respect, and the duty to make a difference.

As we reach out to the community I'm encouraged that so many might find West Orange Montessori Charter School to be that special place where their families belong. We are a growing band linked by our shared vision to create a setting where each child is equally transformed by the mantle of knowledge around them.

Thomas Palmer



Mary-Catherine Segota, Psy.D., P.A.  
Licensed Clinical Psychologist  
Certified Family Mediator

13350 West Colonial Drive, Suite 340  
Winter Garden, FL 34787  
407-654-4433

## CURRICULUM VITAE

### CERTIFICATION

- 2010 Supreme Court Certified Family Mediator #24673F  
2005 Psychologist License #PY7123 State of Florida

### EDUCATION

- 2003 Georgia School of Professional Psychology, Atlanta, Georgia  
Doctorate in Clinical Psychology  
1999 Georgia School of Professional Psychology, Atlanta, Georgia  
Master of Arts in Clinical Psychology  
1996 Loyola University, New Orleans, Louisiana  
Bachelor of Arts in Psychology

### CLINICAL EXPERIENCE

- June 2006 – present **Behavioral Medicine Director / Clinical Psychologist,**  
Executive Health, Pain & Wellness Clinic  
Winter Garden, FL
- October 2005 – June 2006 **Clinical Psychologist**  
Psychological Associates for Total Health  
Miami Shores, FL
- October 2005 – June 2006 **Behavioral Medicine Research Project Manger,**  
**Tele-S.M.A.R.T. (Stress Management and Relaxation**  
**Training for men with Advanced Prostate Cancer)**  
University of Miami,  
Department of Psychology, Coral Gables, FL
- October 2004 – August 2005 **Behavioral Medicine Research Project Manger,**  
**P-S.M.A.R.T. (Stress Management and Relaxation**  
**Training for men with Prostate Cancer)**  
University of Miami,  
Department of Psychology, Coral Gables, FL
- December 2002 – August 2005 **Behavioral Medicine Research Project Manager,**  
**S.M.A.R.T. – Energy Project (Stress Management and**  
**Relaxation Training for individuals with Chronic**  
**Fatigue Syndrome)**  
University of Miami,  
Department of Psychology, Miami, FL

July 2001 – July 2002	<b>Clinical Psychology Intern</b> , University of Miami/Jackson Memorial Hospital, Miami FL.
September 2000 – June 2001	<b>Therapist</b> , Clayton County CMHC, Jonesboro GA
September 1999 - Aug 1999	<b>Therapist</b> , Clayton County CMHC, Jonesboro, GA
September 1999 - Dec 1999	<b>Teaching Assistant</b> , Georgia School of Professional Psychology, Atlanta Georgia
December 1998 – June 2001	<b>Psychometrist</b> , Private Practices, Cartersville, Stockbridge & Covington, Georgia
August 1998 - August 1999	<b>Psychometrist &amp; Therapist</b> , Metro State Prison, Atlanta, Georgia
October 1997 – July 2000	<b>Client Intake &amp; Billing Specialist</b> , The HUB Counseling and Education Center, Tucker, GA
August 1996 - Dec 1996	<b>Psychology Trainee</b> , Private Practice, Slidell, Louisiana
Fall 1996	<b>Psychometrist</b> , Private Testing Center, New Orleans, Louisiana
Fall 1996	<b>Consultant</b> , Hibernia Bank, New Orleans, Louisiana
<b>RESEARCH EXPERIENCE</b>	
October 2005 – present	<b>APC Tele-S.M.A.R.T. - Project Manger</b> , University of Miami, Department of Psychology, Coral Gables, FL
October 2004 – August 2005	<b>P-S.M.A.R.T. - Project Manger</b> , University of Miami, Department of Psychology, Coral Gables, FL
December 2002 – Present	<b>S.M.A.R.T. – Energy Project Manager</b> , University of Miami, Department of Psychology, Miami, FL
July 2000 – September 2003	<b>Attachment Styles and Mental Illness in Incarcerated Women (Doctoral Clinical Research Project)</b> , Georgia School of Professional Psychology, Atlanta GA
April 2000 - June 2000	<b>DeKalb Rape Crisis Center Program Evaluation</b> , Atlanta GA
August 1999 - Nov 1999	<b>Therapeutic Outcome Research</b> , Metro State Prison, Atlanta GA

January 1999 - August 2000

**Therapeutic Outcome Research,**  
HUB Counseling and Education Center, Tucker GA

January 1996 - Nov 1996

**Differences in Locus of Control, Future Time  
Perspective, and Personality Variables Between Violent  
and Nonviolent Male Inmates at a Louisiana State  
Penitentiary.** Loyola University, New Orleans LA

#### **PUBLICATIONS**

Siegel, S., Antoni, M.H., Fletcher, M.A., Maher, K., **Segota, M.C.**, Klimas, N. (2006). Impaired Natural Immunity, Cognitive Dysfunction, and Physical Symptoms in Patients with Chronic Fatigue Syndrome: Preliminary Evidence for a Subgroup? *Journal of Psychosomatic Research*, 60, 559 – 566.

Siegel, S. **Segota, M.C.**, Antoni, M., Maher, K., Fletcher, M.A., Weiss, D., Klimas, N. (2004). A Group-based Cognitive Behavioral Stress Management Intervention Improves Psychosocial and Medical Outcomes in Chronic Fatigue Syndrome. *Psychosomatic Medicine*, 66(1), A92.

#### **PRESENTATIONS**

Siegel, S., **Segota, M.C.**, Antoni, M., Fletcher, M.A. & Klimas, N. (2004) A Group-Based Cognitive Behavioral Stress Management Intervention Improves Psychosocial and Physical Status in Chronic Fatigue Syndrome. A poster presented at: American Association for Chronic Fatigue Syndrome. Madison, WI.

**Segota, M.C.** (2004). Cognitive behavioral group therapy for individuals with Chronic Fatigue Syndrome. Symposium Participant: American Association for Chronic Fatigue Syndrome Annual Conference. Madison, WI.

**Segota, M.C.** (2004). Stress management and relaxation training with Chronic Fatigue Syndrome. Presented at the 4<sup>th</sup> Annual Neuroendocrine-immune Disorders Patient Conference, Pompano Beach, FL.

**Segota, M.C.** (2003). Coping with Chronic Fatigue Syndrome. Presented at the 3<sup>rd</sup> Annual Neuroendocrine-immune Disorders Patient Conference, Pompano Beach, FL.

#### **EDITORIAL**

Ad hoc reviewer: *Annals of behavioral medicine*

Ad hoc reviewer: *International Journal of Behavioral Medicine*

#### **PROFESSIONAL ORGANIZATIONS AND ACTIVITIES**

**FPA Member**, Florida Psychological Association

**Psi Chi**, Psychology National Honor Society

Mary-Catherine Segota, Psy.D., P.A.  
Licensed Clinical Psychologist  
Certified Family Mediator

13350 West Colonial Drive, Suite 340  
Winter Garden, FL 34787  
407-654-4433

July 25, 2010

To Whom It May Concern:

My 4 year old daughter has been attending West Orange Montessori School (WOMS) since she was 2 years old. The consistent, compassionate care they have given her, has helped her overcome a significant separation anxiety. In the calm, ordered space of the Montessori prepared environment, children experience a blend of freedom and self-discipline in a place especially designed to meet their developmental needs, working on activities of their own choice at their own pace, which promotes the development of concentration, motivation, self-discipline, and a love of learning. My daughter has flourished in intellectually nourishing environment under the care of the incredibly skilled and talented WOMS staff, and I look forward to sending my 16 month old son when he reaches the appropriate age.

I have chosen to become involved in the founding board of the charter elementary program because I firmly believe in the methodology and the enormous benefit this type of public education will bring to the Orange County community. As a licensed clinical psychologist, I have experience in a wide variety of areas, which will be beneficial to the development of the West Orange Montessori Charter School program. I have over 10 years experience conducting psychological, academic, and achievement testing. I have worked as a health psychologist with individuals coping with major medical conditions. I also have a background in program analysis which will help ensure that targets are met, and the organization will function as it is intended. But most importantly, as a prior Montessori student myself, I have direct experience with the program and feel that this education is second to none.

Sincerely,

Dr. Mary-Catherine Segota  
FL Licensed Clinical Psychologist #PY7123

*www.drsegota.com*  
Florida Licensed Clinical Psychologist #PY7123  
Florida Supreme Court Certified Family Mediator #24673F

# ELIZABETH R. PALMER

404 Mary Ellen Court  
Winter Garden, FL 34787

(407) 347-7137  
elizabethrpalmer@earthlink.net

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## QUALIFICATIONS

Fifteen years of experience in medical and mental health fields. Founder and director of successful mental health assessment business. Author of two recognized studies in the fields of social work and public health. State of Florida Licensed Clinical Social Worker.

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## EDUCATION

- 8/96-8/99**                    **Master of Public Health – Specialization in Maternal and Child Health**  
University of South Florida, Tampa, Florida
- 8/97-4/99**                    **Master of Social Work**  
University of South Florida, Tampa, Florida
- 1/90-12/92**                   **Bachelor of Science, Health Science Education**  
University of Florida, Gainesville, Florida

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## PROFESSIONAL EXPERIENCE

- 10/09-present**            **Clinical Private Practice**  
Manage all duties related to private practice in Orlando and Winter Garden. Treat clients using varied therapeutic techniques including cognitive behavioral therapy and play therapy.
- 1/04-6/07**                **Highland Behavioral Services–Founder and Director**  
Awarded contract with the Department of Children and Families, Substance Abuse and Mental Health to perform Comprehensive Behavioral Health Assessments, a preventive tool used to assist with decisions regarding children's home placement, mental health services, and medical services. Manage assessors' activities, review assessments, and negotiate annual contract renewal and budget.
- 12/00-8/03**               **Winter Haven Hospital, Winter Haven, Florida - Outpatient Therapist, School-based Therapist**  
Educated parents, guardians, and Polk County School personnel regarding the mental health needs of children. Provided outpatient individual and group therapy to children and teens. Therapies administered included cognitive behavioral, play therapy, art therapy, and social skills training.
- 4/99-8/00**                **Harbors Home Health and Hospice, Hoquiam, Washington - Medical Social Worker**  
Provided psychosocial evaluation with recommendations and treatment plan, and direct medical social services for individual clients and families receiving home health and hospice care; coordinated volunteer and bereavement services for the hospice program.
- 1/98-4/99**                **Social Worker – Intern**  
Washington State Department of Social and Health Services, Children and Family Services  
    > Provided assessment and consultation services for families involved with department.  
University of South Florida, College of Medicine, Early Intervention Program  
    > Provided individual and family therapy, and case planning and referral services for families with developmentally delayed children.
- 7/93-5/96**                **State of Florida Health and Rehabilitative Services**  
**Children and Families Counselor**  
    > Managed case activity for families referred through the Florida abuse hotline.  
**Human Services Program Analyst - Alcohol, Drug Abuse, and Mental Health Program Office**  
    > Consulted in contract negotiations with mental health service providers, devised monitoring tools from the Florida Statute, and performed site visitations to service providers.

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## PROFESSIONAL LICENSES, CERTIFICATIONS, AWARDS and PRESENTATIONS

- 2010**                    Certified Medicaid and Medicare services provider  
**2003**                    State of Florida Licensed Clinical Social Worker #SW7064  
**1999**                    USF Collaborative on Children, Families, and Communities for award-winning study entitled *Early Intervention Service Needs and Consumer Support*.  
**1997**                    *From Teenage Mother to Success* presented at the annual American Public Health Association Conference  
**1997**                    USF College of Public Health Scholarship, AHEC Training Stipend for Health Care in Rural Areas

Elizabeth R Palmer LCSW, MPH

132 W. Plant Street Suite 220, Winter Garden, FL 34787  
Phone: 407.621.1611 Fax: 206.338.5557

July 13, 2010

Re: West Orange Montessori Charter  
Governing Board member

Dear Sir or Madam:

Please accept this letter with my attached resume as verification of professional experience that will contribute to the establishment of West Orange Montessori Charter School. As a child psychotherapist, I am familiar with methodologies and behavioral interventions that create a successful social-emotional environment for children. Research has shown that children who learn emotional intelligence from their parents and teachers are happier and more successful than peers who do not learn these important skills. Emotional intelligence is generally defined as the ability to interpret one's emotions and act accordingly.

The academic structure created by the Montessori Method establishes a framework that fosters sensitivity, respect and acceptance of the individual child, all crucial components of supporting emotional intelligence. With this framework in place, I intend to bring the knowledge that I have obtained through research and practice to provide sound advice to the governing board on enacting specific school-wide policies that teach emotional intelligence along with academics.

Sincerely,

Elizabeth R Palmer

## **MICHELLE L. WOOD**

1422 Sherbourne Street, Winter Garden, FL 34787  
Cell (407) 616-7998     Michelle.L.Wood@disney.com

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### **Career Summary**

- 8 years in the Workforce Management Scheduling Department (Labor Operations) with multiple lines of business
- Trained and Mentored Advanced Scheduling Interns

### **Career Skills**

- Builds, strengthens, and maintains strong service-oriented Guest and Client relationships
- Ability to interact positively with all levels of management
- Advocate of continuous improvement of work processes
- Self-motivated in continuing business related education
- Proven Time Management skills

### **Work Experience**

#### ***Workforce Management Scheduler***

*Disney's All Star Resorts* October 2008-Present

- Blueprint Learning Journey for All Star Food and Beverage
- Backup to COT/Core Trainer Scheduler for Walt Disney World

*Disney's Hollywood Studios Merchandise and Disney's Photo Imaging* March 2007-October 2008

- Partnered with DPI location leaders to transition from scheduling shifts times to covering the workload and utilizing CDS.

*Magic Kingdom Merchandise* April 2004-March 2007

- Trained and Mentored Advanced Scheduling Interns
- Implemented Bucket Bids for the Magic Kingdom Merchandise
- Represented Scheduling in a Spotlight on Labor Operations
- Participant in the Scheduling Summit between Walt Disney World Resort and Disneyland Resort

*Coronado Springs Resort* Front Office, Recreation and Housekeeping July 2002 – April 2004

- Trained Cast Members as Schedulers
- Prepared Labor Roll-up for Leaders in the area to manage their daily labor costs

#### ***Front Desk Hostess***

*Disney's Animal Kingdom Lodge* March 2001 – July 2002

- Opening Training Team Member, created day by day training process for new Cast Members
- Developed policies and procedures for new Trainers
- Liaison between Engineering, Housekeeping and the Front Desk Support team.

*Disney's All Star Movies Resort* June 1999 – March 2001

- Facilitated guest arrival and resort experience
- Trained Cast Members in Front Desk and Guest Services

***Office Manager and Administrative Assistant, Randall D. Jones Insurance and Investments*** April 1994 – May 1999

- Created client list databases using Microsoft Access and prepared insurance illustrations for clients and agents. Leader of a three person office team.

### **Education**

*Bachelor of Science in Management, Florida State University* August 1995-April 1999

**Proficiencies**

GEMS, SAP reporting, Extra Hours Hotline, Sharepoint, Microsoft Office 2007 (Outlook, Excel, Word, Access, PowerPoint), Labor Service Center Processing, Additional Hours Sign Up, Cast Deployment System, ETRS, Workbrain, and Hummingbird Document Manager

**Activities**

Junior Achievement Bowl-a-thon

**Awards**

Partners in Excellence Nominee



1422 Sherbourne Street  
Winter Garden, FL 34787

July 28, 2010

Dear Sir or Madam:

I have been a Workforce Management Scheduler for the last 8 years, managing the labor coverage of multiple operations on a weekly basis.

Over the last year since my son started at West Orange Montessori Preschool, I have seen him grow into a well round child. He had a speech delay with barely 15-20 words that he would voluntarily speak (at age 3) and would not play/interact with other children. He now is able to give complete sentences and thoughts that amaze me everyday. He loves to runs and play with other children (participating in the group activities).

Seeing the change in my child has inspired me to want to continue his education in a Montessori environment as he enters into his Elementary and Middle School years. I knew that he (and other children of Orange County) could benefit from a public Montessori School experience. That motivated me to join with other parents and create an introductory board for a Charter school.

As Secretary of the Board for West Orange Montessori Charter School, I wish to participate in creating a safe and positive environment for children to grow and learn. By maintaining the meeting notes and ensuring that the boards complies with all the necessary documentation needed to create and run a public Montessori school for the children of Orange County.

Sincerely,

Michelle Wood  
Workforce Management Scheduler

## M. Anya Kaleshefski

13630 1st Ave.  
Winter Garden, FL 34787

321-228-4535  
renegade1000@live.com

### EXPERIENCE:

- Florida Virtual School** 02/08 to Present  
2D Art Instructor
- Lakeview Middle School ~ Winter Garden, FL** 07/06 to 02/08  
**Orange County Public School System**  
8th grade Language Arts Instructor  
Humanities Instructor – Created only Humanities program in OCPS middle school.  
Captain of Lakeview Middle School Relay for Life Team  
Faculty Sponsor for the National Junior Honor Society
- Lakeview Middle School ~ Winter Garden, FL** 07/05 to 07/06  
**Orange County Public School System**  
Floating Humanities Teacher  
Sponsor for National Junior Honor Society  
Created & Produced The Panther Festival -2 yrs  
Production Manager for school play "The Music Man"
- Lakeview Middle School ~ Winter Garden, FL** 10/01 to 07/05  
**Orange County Public School System**  
Sixth Grade Reading/ Language Arts/ Humanities Teacher  
Sponsor for National Junior Honor Society  
Direct Instruction – Excellent documented learning gains
- Creative Event Management, Inc.** 05/01 to 9/11/01  
President/Owner ~ Special Event Production and Design
- Wizard Connection ~ Orlando, FL** 10/00 to 06/01  
Creative Director - Sales
- Shepard Exposition Services ~ Orlando, FL** 8/99 to 10/00  
Special Event Director – Designer - Sales
- Event Design Group ~ Atlanta, GA** 8/98 to 8/99  
Production Designer – Event Director
- Freelance Event Director ~ Winter Garden** 3/98 – 6/98  
Volunteer - City of Winter Garden Halloween Festival  
and May Day Celebration
- Freeman Decorating – Orlando, FL** 10/97 – 3/98  
Event Coordinator – Production Foreman
- Mile High Adventures & Entertainment** 1/97 - 10/97  
Event Coordinator
- Creative Design / Universal Studios Florida** 10/96 to 12/96  
Art Coordinator - Project development, vendor liaison, art direction
- Attractions Merchandise / Walt Disney World** 4/96 to 10/96  
**Store Planning and Design**  
Project Coordinator for World of Disney Store Project  
Responsibilities include vendor research, project liaison, product development,  
budgeting, lite design work, and retail set-up.

**Creative Entertainment / Walt Disney World**

6/95 to 4/96

## Production Coordinator

Production support for division through Art department. Created, produced, designed presentations for Eisner approval. Maintained wide variety of reference information, liaison with freelance artists.

**Specific Projects:**

Art Director	Celebrate the Music - Washington D.C.
Scenic Coordinator	Russian Mosaika - EPCOT
Scenic Coordinator	Indy 200 Grand Opening Celebration
Art Coordinator	25th Anniversary Parade
Art Director	Chicago Lights Festival - Chicago

**Freelance Event Director**

2/95 to 6/96

The 1995 Mid Florida Muscle Classic - Mr. Olympia Shawn Ray  
UCF Communications Dept. Women's Scholarship Foundation Annual  
Follies - Camelot Scholarship ~ 93-96

**Promotions Unlimited of Florida**

2/94 to 6/95

## Event Coordinator

Winter Park St. Patrick's Day Parade - Miss U.C.F. '94  
The Great Southern JazzFeast - Aaron Neville & Neville Brothers  
Interceptor Doggie Derby '94-'95  
"Santa Salutes the Soaps" Holiday Parade - related events '94

**Media Services and Production Group, Inc.**

2/94 to 2/95

## Event Director

Business management, sales, marketing, advertising, promotions, including Event Director for the 1994 Milk Challenge Basketball Classic, Orlando, FL - Orlando Arena - December 17th, 1994  
Organized and coordinated Double-header game event, Golf Outing, Team Dinner, ticket management.  
Created, designed, produced, state-wide promotion for "Create A Mascot Contest for Dairy Farmers, Inc."  
Designed, edited, and compiled official game program  
Coordinated television production for statewide live broadcast

**BUSINESS SKILLS:**

writing business correspondence, sponsor requests, proposals, press releases, promotional materials, design scopes  
designing, organizing, and producing event materials, posters, programs, marketing packages.  
on site directing and organizing of events, ticketing, publicity, media, coordinating technical support. performers, participants, and volunteers

**EDUCATION:**

Certificate: English 6-12, Art K-12  
Planning on pursuing National Boards in Art Education  
University of Central Florida, Orlando, FL  
Bachelor of Arts Degree - English Literature  
Florida State University, Tallahassee, FL  
Associate of Arts Degree

**References furnished upon request.**

July 29, 2010

To Whom It May Concern;

I am excited to be on the founding board of the West Orange Montessori Charter School because I believe that education is the key to raising productive, compassionate, and responsible members of society.

As the daughter of college level educators, and a middle school teacher myself I believe that the Montessori method focuses on the whole child and that this is the ideal learning environment. All of the intelligences are used and children experience learning through all of their senses.

The teachings of Maria Montessori concentrate on the individual student and allowing them to reach their full potential at their own pace.

I am thrilled to be involved in the inception of bringing the Montessori method to the children of West Orange County and our future community leaders.

Sincerely;

M. Anya Kaleshefski

**ORANGE COUNTY PUBLIC SCHOOLS  
2009-2010 INSTRUCTIONAL SALARY SCHEDULE**

<b>Years of Experience*</b>	<b>Bachelors Degree</b>
0	\$37,000
1	\$37,250
2	\$37,500
3	\$38,000
4	\$38,400
5	\$38,800
6	\$39,130
7	\$39,600
8	\$40,100
9	\$41,004
10*	\$41,720
11	\$42,200
12	\$43,000
13	\$43,706
14	\$44,600
15*	\$45,600
16	\$46,000
17	\$47,000
18	\$48,430
19	\$51,006
20	\$54,606
21	\$56,205
22	\$57,285
23	\$58,000
24	\$62,003

**2009-2010 ADVANCED DEGREES**

<b>Advanced Degree</b>	<b>Pay</b>
Masters	\$2,605
Specialist	\$3,993
Doctorate	\$5,267

*Employees will be paid for the highest degree earned in addition to the base pay for their Bachelor's degree.*

In order to receive credit for advanced degrees, (Masters, Specialist and Doctorate) employees must provide an official transcript of record showing the award of the earned degree to Employment Services.

\*Teachers who have retired and reemployed will be placed on the salary schedule based on years of experience, but no higher than Pay Level 10; Pay Level 15 for the designated lowest performing schools.

# WOMCS PARENT-SCHOOL AGREEMENT

## I FIELD TRIP AGREEMENT

### Parent Agreement

I agree to allow my child \_\_\_\_\_ to travel on foot or by bus to Winter Garden locations such as the Public Library, Recreation Center, History Museum, Oakland Nature Preserve, or other locations in downtown Winter Garden during the school year.

\_\_\_\_\_  
Mother Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Father Signature

\_\_\_\_\_  
Date

## II CODE OF CONDUCT AGREEMENT

### Student/Parent Agreement

I have received a copy of the OCPS Code of Conduct and agree to read the code, discuss it with my child attending West Orange Montessori Charter School, and support the school in implementing the policy spelled out in the code. Further, I agree to do the same with the WOMCS Code of Conduct found in the Parent Handbook and its accompanying ramifications for code violations.

\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Mother Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Father Signature

\_\_\_\_\_  
Date

### School Agreement

It is the policy of West Orange Montessori Charter School to re-direct children toward appropriate behaviors. In those cases when a child has misbehaved, WOMCS agrees to use fair, non-corporal methods in disciplining your child, including, but not limited to time out, cleaning duties, missed recess, loss of privileges, detention, community service, and/or suspension. The Director and teachers agree to discuss all infractions with parents and to work with parents to develop clear, fair and consistent action plans to ensure the child's progress. In those unusual cases when the director and parents cannot reach an agreement, the WOMCS Board agrees to provide the child and parent with a fair hearing.

\_\_\_\_\_  
Director

\_\_\_\_\_  
Date

## III SCHOOL DIRECTORY AGREEMENT

### Parent Agreement

I give permission for my address, email and cell phone number to be published in the WOMCS School Directory.

\_\_\_\_\_  
Mother Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Father Signature

\_\_\_\_\_  
Date

IV

UNIFORM AGREEMENT

Parent Agreement

I recognize that West Orange Montessori Charter School requires specific uniforms to be worn, and as a parent, I will bring my child to school dressed appropriately and support the school in implementing this uniform dress code policy. Please refer to the complete uniform policy in the Parent Handbook.

_____	_____
Mother Signature	Date
_____	_____
Father Signature	Date

V

VOLUNTEER REQUIREMENT

Parent Agreement

I recognize that West Orange Montessori Charter School requires a twenty-five hour volunteer commitment (thirty hours for families with multiple children). I agree to perform those duties during the school year. I understand if the requirement is not fulfilled, re-enrollment will be denied effective June 15th. 8<sup>th</sup> grade parents must have hours completed by the conclusion of the Class Trip in order for student to participate in end of year activities. Cards will be sent each trimester verifying hours. Parents have 10 days after receipt of the card to correct errors before they become final. Parents are responsible for recording their own hours in the Parent Volunteer Log, located in the school office. If they are unable to do so they must email the Director with the dates/times for recording.

_____	_____
Mother Signature	Date
_____	_____
Father Signature	Date

VI

HOMEWORK AGREEMENT

Parent Agreement

I recognize that my child will receive a reasonable amount of homework per night (usually there will be no homework on Friday). Homework will reinforce lessons learned in class. As a parent, I agree to check my child's homework nightly to ensure it reflects completion as posted on the website or through teacher sent emails. I agree to listen to my child read aloud every day, or in the case of older students, to review the recorded time spent in silent reading at home, as part of the school homework policy.

_____	_____
Mother Signature	Date
_____	_____
Father Signature	Date

VII

PERMISSION TO PHOTOGRAPH

Parent Agreement

I give my child permission to be photographed. The use of these photographs will be for school related activities such as marketing for enrollment, the school web site, without the use of names. Photos may be used for local newspaper coverage of school events.

_____	_____
Mother Signature	Date
_____	_____
Father Signature	Date



## **Lake Eola Charter School**

July 9, 2010

To Whom This May Concern:

It is a pleasure to write this letter of support for the application of the proposed K-8 Montessori Charter School. One of the goals of the charter school movement is to bring innovation to schools. While Montessori schools have been around for years, the proposed K-8 model is new to the Orange County public school arena. In education, we look for schools that address the needs of students and too often the needs of gifted students are over looked. This school would address that need and as the director of an Orange County Charter for the last ten years, I fully support this application.

I wish them luck in their application and offer any support I can give to their effort both professionally and personally.

Very truly yours,

*Ronnie DeNoia*

Ronnie DeNoia, Ed. D  
Director, Lake Eola Charter School



July 27, 2010

Michelle Dulany,

I am pleased to know that the West Orange Montessori Charter School is seeking serve the Winter Garden and West Orange Community. I believe that the choice of a Montessori Charter School in the community enhances the opportunities that families have to choose from a variety of quality educational programs. Having worked with a K-6 Montessori international school I am aware of the quality learning that takes place through the internationally recognized Montessori method and curriculum. Your school can only be a valued addition to the West Orange educational community.

Dr. Joseph Worsham, Ed.D.

Vice President, Pacific Global Investment Management Company

Retired Principal West Orange and Cypress Creek High School, Senior Director Secondary Education, Orange County Public Schools, Head Master American Academy, Nicosia, Cyprus

July 12, 2010

Lisa Bobowicz  
10619 Oakview Pointe Terrace  
Gotha, Florida 34734  
407-656-2394

To Whom It May Concern:

I am writing this letter in support of the addition of the West Orange Montessori Elementary Charter School to my community. I am a resident of Gotha, and my son has been attending the West Orange Montessori School (pre-school through kindergarten) for the past three years in Winter Garden.

The Montessori method of teaching and the care and attention Montessori teachers give to children is immeasurable. The Montessori way allows every child to work at his or her own pace. It individualizes education, does not label a child, and ensures that EVERY child is successful. A Montessori child is urged to question what he or she is learning and not simply take everything at face value. A Montessori child learns in a hands-on and nurturing environment, thus stimulating all his or her senses.

All of these attributes have challenged and encouraged my son Nicholas, allowing him to excel in the areas that he has a natural talent in and become successful. The approach Montessori takes in teaching a child to read is done so well that Nicholas was reading books in pre school. Nicholas has not only learned in Montessori, he has learned how to learn effectively!

I hold a Master's Degree in Education and am embarrassed to say that I never knew very much about the Montessori method prior to my son's experience at West Orange Montessori. Now I cannot imagine Nicholas learning in any other environment. He has been set up for success and I am proud to say I am a parent of a Montessori child!

Please allow the West Orange Montessori Charter School to open its doors and welcome elementary age students into a learning environment that will challenge young minds, create successful students and ultimately have positive and long lasting effects in our community. Every parent should have the opportunity to feel as proud of their child's learning as a Montessori parent does!!

Sincerely,

Lisa Bobowicz



July 16, 2010

Re: West Orange Montessori Charter School application

To Whom It May Concern:

I'm writing to express my support for the West Orange Montessori Charter School in regards to their application with Orange County. I have personally and professionally known Michelle Dulany, the founder of the Montessori school in Winter Garden since she relocated to Florida a couple of years ago. I've watched as Michelle started the Montessori school in Winter Garden and followed the school's growth with admiration. I've visited the current Montessori (Preschool through Kindergarten) school and have observed her teaching and interacting with the students who are flourishing in their environment there.

As a local business leader and personal friend I would very much like to recommend approval of the West Orange Montessori Charter School application as I feel it will be a benefit to central Florida and the students who are admitted. Montessori teachings have a very loyal following among parents, many of whom, in this economy, are unable to afford their children this type of education. Having a Montessori Charter School will be a great opportunity for the parents and students of Orange County.

Respectfully,

Lisa Bennett, Broker  
Windsor Realty Group, Inc.  
160 S. Main St.  
Winter Garden, FL 34787  
321-948-9296

Windsor Realty Group, Inc. (incorporated)  
160 S. Main Street, Winter Garden, FL 34787  
321-948-9296  
www.findwindsor.com



Dear Ms. Dulany,

I am writing this letter in support of your work to open a Montessori Charter School in Orange County.

My children have attended Lake Eola Charter School since Fall 2000. Our family is privileged to have been afforded this opportunity for such a high quality education.

While we feel blessed to have access to our charter school, we are well aware of the long waiting lists every year as more and more parents seek meaningful and successful alternatives in education for their children in our local community and throughout our nation.

Without the Charter status at our school, we would not have been able to afford this kind of education elsewhere (privately). Because of the wonderful experience our children have enjoyed at the Charter School, we are committed to support quality charter schools in our community, now and for the foreseeable future. For our family, the charter school has meant high expectations in achievement, both academically and personally. This has translated to a teenager thoroughly prepared and eligible for the most elite academic program in high school. I am constantly told by high school teachers that the students coming from our charter school are better prepared for high school than the majority of their counterparts. I have similar high hopes for your school.

We have been able to enjoy small class sizes, individualized and innovative instruction, the most creative curricula (without textbooks and no focus on FCAT preparation), and a small school community, all of which we believe have benefited our children immeasurably.

Our daughter attended a Montessori pre-school and we are thrilled that a Montessori school will be opening as a charter school in Orange County. As a result of your school being open to Orange County, more families will have access to high quality alternatives for elementary education. Without a doubt, your school will be an asset to our Central Florida community.

Please feel free to contact me if I can be of further assistance. Thank you for your hard work and dedication.

Sincerely,

Sandy Stenoff  
3749 Ventura Pl  
Orlando, FL 32822  
(321) 247-5083 before July 14  
(407) 277-6779 after July 14

Hi Michelle--

We're so happy to hear that you're being considered for a charter Montessori school! Wonderful news!

As you know, our daughter Samantha has fonder memories of your school in Maine than of any other educational experience -- or perhaps, of any other experience, period. She loved every day and every minute of school with you two, and has become a voracious reader, a star math student and a curious, creative and humane person as a result of the four years she spent at Midcoast Montessori School.

When we first met, you (Michelle) talked about the importance of values. Life-serving values may be the very most valuable gift Sam received from her time with you and Ken -- a keen sense of fairness and of compassion for others, a curiosity about life, and a love for all the earth's creatures. You two create environments where trust, fun, self-respect and respect for others are deeply-held values in the hearts of your students, and you've had a great deal to do with Samantha's becoming the good person she is today.

I hope you'll have the opportunity through a charter school to bring the special Ken, Michelle and Maria Montessori magic to an ever-wider circle of children! The world certainly needs the kind of good-hearted people you've been working so effectively to create!

With gratitude and respect to you,

Eric and Hoa Herter  
Brunswick, ME

Hello Michelle,

I just read about the discussion to open a Montessori charter school here in Orange Co. through one of my mothering groups. I want to express how absolutely thrilled this makes me. I have been agonizing over the idea of sending my precious daughter to a public school because I simply have not found one that shares my same education philosophy.

There are several Montessori programs in the area however their tuition is much more than I can afford for my daughter to have the education that I really want for her. I feel that parents shouldn't have to make that choice. Education is SO important and giving parents as many options as possible (including the alternative styles of education) is incredibly important. A public Montessori school would make Montessori education accessible to so many families that strongly believe in this philosophy of education. Our current education system is not meeting, what I feel, are the true needs of our children. I personally want my child to be taught as *a whole*. I want her spirit to be nurtured above all and I know that from this place she will develop a love of learning, at her own pace, based on her individual interests, and with little pressure. I want for every child to have this and opening a public Montessori school would make that possible for many families.

Please, I hope that you give very strong consideration to the letters you are receiving and support moving this idea forward. Please keep me informed of any meetings you have as I want to be involved in this initiative. Thank you.

**Michelle Isla** CD(DONA), CLC, CPCE

"Peace on Earth Begins with Birth" Jeannine Parvati Baker

Doula, Lactation Counselor, Birth Educator, Student Midwife

July 27, 2010

Michelle,

I was so excited to hear about the possibility of a Montessori Charter School here in West Orange County. I believe it is a great idea and would be a wonderful asset to our community.

Best of luck to you all and involved in this exciting venture.

Sincerely,

John R. Kirby  
**Kirby Engineering, LLC**  
407-877-9400  
407-877-9983(Fax)  
Mailing: P. O. Box 770669  
Winter Garden, Florida 34777  
Physical: 308 S. Dillard Street  
Winter Garden, Florida 34787

# **HUDSON TIRE & Service, Inc.**

10 W. Story Road • Winter Garden, FL 34787-3583  
(407) 656-6646

July 13, 2010

To Whom It May Concern:

I am writing in support of the West Orange Montessori Charter School and the benefits that it will bring our community.

A Montessori Charter will offer parents and students another option to the local public schools. A Montessori education educates the whole child. It prepares children academically, socially, and emotionally to reach their fullest potential. These children will be the future of our West Orange community.

I am very excited to know that our West Orange County students may have a choice to attend a Montessori school. Its benefits are numerous and our children will prosper.

Sincerely,



Reggie Hudson  
Owner/Operator  
Hudson Tire  
10 West Story Road  
Winter Garden, FL 34787-3583



To Whom It May Concern,

I am writing this letter to support the petition for a Montessori Charter School in Winter Garden, Fl. My two grandsons have been enrolled in the present Montessori pre-school. They will enter Kindergarten and First grade in the fall. They are in a learning environment that cultivates active learning rather than passive or rote learning. My observation of the teaching they have benefited from is not just academic, although they are both very bright little boys with a love of books and a keen interest in the world around them. The skills they are being taught in attitude, sense of order, curiosity, concentration, persistence, decision-making skills and self discipline are more important to me, as a grandmother. These are skills that will be invaluable to them in the years to come.

Private Montessori schools may charge \$5,000 to \$11,000 annually for tuition, public Montessori schools give students the same educational philosophy for free. Like their private counterparts, public Montessori schools supplement the academic curriculum with music, art, language and nature based classes. This was, in years passed, considered a well rounded education. These courses were part of a public education when I was growing up and when I raised my children, The public schools are no longer able to offer this to our children. How will future generations be blessed with great music, art and scientist if these subjects are no longer taught?

Since state legislatures passed charter law in 1990, charter schools have seen an enormous increase in number. In the public school system there are trends that emphasize student performance with little regard for the quality of student experience. Charter schools are emerging as an alternative to the traditional system of education. Montessori is an option that can challenge, motivate and improve the present system of education. With the rate of high school drop outs reported as growing every year, we need to look at our educational system.

As I look at the world around me that we, as adults, have contributed to, I can not help but be concerned for the children. In these economic times children and their programs are the first to be cut or not supported.

What will our world look like in the years ahead if we continue down this path? I hope you will vote for this petition. It could make a difference in the lives of young children in our community. Our world will not be the world we want for our children, if money rules our educational system. There will not be a bright tomorrow without education - education for all. Please vote yes for our charter school and sit back and watch the change in education - one child at a time - occur in our community. You will not be disappointed.

Janice Reed

To Whom It May Concern:

I believe the West Orange Montessori Charter School will be a valuable addition to the Central Florida community. Through the unique approach formulated by Dr. Montessori, each child is nurtured during a most important time of development to become a self-confident person. With the ability to learn at ones own pace, Montessori offers its students the opportunity to work on lessons in such a manner that the whole child becomes stronger, developing characteristics that are invaluable for the rest of their lives. For some students, this can mean the difference between getting the most out of an education or just coasting through.

As a resident of Maitland, I have seen how Montessori has made a difference in the lives of many children. A school of this caliber will be an asset to West Orange County.

Sincerely,

*Heather Wolfe*

Heather Wolfe  
895 Town Circle  
Maitland FL 32751



July 16, 2010

To Whom it May Concern,

As founder and Principal of Crabtree Ink Ad Agency, as well as a native to the area, it has been exciting to see the Cultural Arts come alive in Winter Garden. With the opening of the Garden Theatre and the Crealdé School of Art extension, at the Winter Garden Jessie Brock Rec Center, these Art programs are on a path to becoming more of a cornerstone for the area.

However, while these two institutions have added a lot to this local community, there are still so many of the arts being cut from public school system each-and-every year.

Therefore, it is refreshing to know that schools like the West Orange Montessori Charter School, are still supporting these similar art programs that led me into the art field, that now has become my career.

I would ask that you support West Orange Montessori Charter School to continue to Cultivate the Arts for many generations to come.

Sincerely,

A handwritten signature in black ink, appearing to read "Andy Crabtree", with a long horizontal line extending to the right.

Andy Crabtree  
Principal/Owner, Crabtree Ink

*Make a lasting impression. Put it in Ink!*



**REDENTA SOPRANO**

1615 Roundelay Lane  
Winter Park, FL 32789

(407) 679-0948

redenta@earthlink.net

July 9, 2010

This letter is concerning the Montessori K-8 Charter School project in west Orange County.

As an artist and educator, I believe giving parents a choice to give their children a Montessori education is an excellent idea! Montessori Schools provide a special hands-on learning environment uniquely suited to some students that will allow them to excel through individualized attention. This kind of education stimulates interest in learning and provides an invaluable asset to a young person's educational experience.

A school like this, in Orange County would be a great resource to the community. I know Michele Dulany and her husband, Ken personally, and there are few people in my estimation, who are more passionate and dedicated to early childhood education.

I think the prospect of a Montessori School education as a charter school, would be a huge benefit to the West Orange community and perhaps inspire more schools in the area to encourage excellence among their students.

Many thanks for your time and attention.

Sincerely,

Redenta Soprano

To whom it may concern,

Montessori school system is a fantastic educational philosophy that builds the foundations for learning from early on and teaches the children based on their ability to learn rather than their age. Montessori is a great alternative for those who find the traditional educational system either too restrictive or overwhelming. But today, in many communities around the country including mine, Montessori schools fall in the private school sector, which can be very costly. Many parents do not have the option of considering Montessori education for their children. As a tax-payer, I would like to have the opportunity of choosing a Montessori school for my children and this option should be available at no cost to all parents and their children in the community.

I have two children who attended Montessori school through Kindergarten but were unable to continue on because an elementary school is not available in our community and if it did, it would simply be too costly. A public Montessori school is greatly needed and appreciated in our community.

Yassaman and Mansour Garemani  
4526 River Gem Ave, Windermere FL 34786

To Whom It May Concern:

I am writing in support of the West Orange Montessori Charter School and the benefits that it will bring our community.

Learning should be an exciting process of discovery but many children often find confusion and frustration. The Montessori method focuses on a multi-sensory approach, which fosters each child's learning style. In a multi-age classroom, each child learns at their own pace and feels part of the learning community, including children with learning difficulties. Children become more motivated and develop a love for learning.

A Montessori education educates the whole child. It prepares children academically, socially, and emotionally to reach their fullest potential.

I am very excited to know that our Orange County students may have a choice to attend a Montessori school. It's benefits are numerous and our children will prosper.

Sincerely,

Kristi Beverley

*Kristi Beverley*  
3316 N. Orange Ave.  
Orlando, FL 32803

July 14, 2010

To Whom It May Concern,

We are parents to Cate, 4 years old and Lia, 5 months old. Cate currently attends West Orange Montessori pre-school program and has been there for a little over a year now.

Since she has been with West Orange Montessori, we have been so pleased with her growth both as a responsible little person and in her educational skills. It is VERY important for us to continue Cate in a Montessori program near our home in Windermere. This will also be the same for Lia in the future.

As their parents, we see how valuable and beneficial the Montessori K-8 program will be for our girls. This experience would build such a wonderful foundation for them and help give them the skills and knowledge they would need to be successful and respectable beings in this world.

We hope you would please, please, please consider approving a Montessori Charter School in Winter Garden.

Sincerely,

Hedy and Brian Solomon (Parents to Cate and Lia)  
11639 Vicolo Loop  
Windermere, FL. 34786  
407-258-8614

To Whom It May Concern,

I am thrilled to hear about the possibility of a Montessori charter school in the Orlando area. The Montessori method is known for inspiring and instilling in children joy and love for learning, and for working with the child at their level and pace for true self-directed learning. I subscribe to Montessori's belief that we should encourage a child's natural development, with the teacher or director/directress simply removing obstacles that would interfere with this path. I also appreciate so much the emphasis on real-life situations and "work" for the children to emulate, which is something small children absolutely love to do.

I wholeheartedly support the creation of such a charter school, and hope there is room in it for my preschool daughter to attend!

Thank you for your consideration,

Jennifer Larsen  
Orlando, FL



Dear Sir or Madam:

I am writing this letter in support of a new, Orange County Montessori School opening in the Winter Garden area.

In the United States of America, citizens have grown accustomed to the idea of having choices available to them. We can choose countless varieties of breads, televisions, even multiple types of socks. And, we have the choice to go to multiple stores to purchase these items.

Charter Schools provide more choices in education for our children. For our family, Montessori is a choice that we do not want taken away. Michelle Dulany and her board are trying to provide the opportunity for more people to benefit from the Montessori experience. Many parents will decide public school is their best option. Many parents will decide to home-school their children or provide a private education for their children. For our children, we want to be able to choose Montessori. In this country, we are provided with so many choices. But, there is no choice more important than how a parent wants their children to be educated.

A really sad thing occurred for our family. My husband and I woke up with the realization that we were not going to be able to continue to afford our daughter's private Montessori education. In the past couple of years, our preschool daughter has grown and blossomed so much. Not only has she learned math, reading, and the habitat of all the continents, but our daughter has learned to love learning. Our daughter wakes up each morning, ready and eager for school to start. And, she wakes up sad on the weekends that she will not be able to attend. She has learned to be a peaceful and caring person. And, she has learned that she is part of a larger and greater community.

In the time that I have spent with Michelle, I have grown to trust her completely as an educator, as a Montessorian, and as a friend. I have full confidence that she can provide an excellent education for our children and many others.

Please, help make this choice available.

Sincerely,

Bruce and Tracy Jacobson  
355 Haverlake Circle  
Apopka, FL 32712  
(407) 808-7257

To Whomsoever Concerned

My daughter Bhavana Venkatesh aged 5 attended West Orange Montessori school past 2 yrs which is run by Michelle Dulany. I am very happy & pleased with the education that my daughter received from their program. We need such schools who promote knowledge to kids in Montessori way which is the best way to teach kids & service oriented person running such institution & they are the best you could get in Winter Garden Florida. I and my neighbors are happy & willing to say that we strongly support their effort to open a Montessori K-8 Charter School which is very much needed in this neighborhood.

Jyothi Venkatesh & Neelakantan Venkatesh  
4527 River Gem Ave  
Windermere, Florida

Jennifer and Todd Dubasak  
1818 Burdock Drive  
Winter Garden, Florida

To Whom It May Concern:

My daughter Eva was lucky enough to attend West Orange Montessori School under Michelle Dulany when she was three-years-old. We switched her to public school for Pre-K in large part because we did not find local options for her Montessori education after Kindergarten. We now have a one-year-old son and would absolutely take advantage of having a Montessori Charter School for both of my children in our community. Eva responded so well to the individual attention and personalized education plan and we loved the philosophy of teaching inner discipline through exposure to mental and physical order. The Montessori philosophy is a continuation of the home life we strive to provide for our children. We feel offering the option of a continued Montessori education would greatly benefit our community and our children. Thank you for this consideration.

Sincerely,

Jennifer and Todd Dubasak  
Parents of Eva (5) and Cash (1) Dubasak  
310.748.8043

March 5, 2010

TO: West Orange Montessori School  
FROM: Caleb & Sarah Scorsone  
14534 Old Thicket Trace  
Winter Garden FL 34787  
RE: Public/Free Montessori Elementary School

To Whom It May Concern:

Hello, I am currently a home schooling parent looking for more support in schooling my children. I am a member of a home schooling co-op, but do not feel that it is adequately meeting my children's needs for social integration. I have always desired to enroll my children in a Montessori school, as I strongly believe in providing an environment for children that stimulates a love of learning, while developing their individual strengths and styles of learning. As a home schooling parent I am concerned with providing a healthy environment for the development of social skills coupled with the opportunity to expand mentally, emotionally and spiritually. I believe in the Montessori approach in that it encourages children to use their imaginations as well as a more hands-on approach to education.

I am very excited about the potential opportunity for my 2 children to be enrolled in a public/free Montessori Elementary School in the Winter Garden/Windermere area of Florida! I feel that this is a huge opportunity for my family to be involved. My husband and I have struggled financially over the last few years due to losing our business in this devastated economy and as a parent my primary concern is for the welfare and growth of my children. I am not in a place to financially enroll both of my children in the type of school I desire for them. However, I feel that they need more at this time than home schooling can offer them. Additionally, this would enable my family to become financially stable, as I would then seek employment. This would be a wonderful opportunity for my family and many others in our community!

Sincerely,

*Sarah Scorsone*

July 14, 2010

To Whom It May Concern:

I am writing in support of the West Orange Montessori Charter School and the benefits that it will bring our community.

A Montessori Charter will offer parents and students another option to the local public schools. The Montessori method values the arts and promotes a community responsibility not only for our individual community but also our global community.

A Montessori education educates the whole child. It prepares children academically, socially, and emotionally to reach their fullest potential. These children will be the future of our West Orange community.

I am very excited to know that our West Orange County students may have a choice to attend a Montessori school. Its benefits are numerous and our children will prosper.

Sincerely,

A handwritten signature in cursive script that reads "Jennifer I. Page". The signature is written in dark ink and is positioned above the typed name.

Jennifer Page  
Owner/Operator  
Page's Pastiques Inc  
741 Tildenville School Rd  
Winter Garden, FL 34787

WEST ORANGE MONTESSORI CHARTER SCHOOL  
 PROJECTED OPERATING BUDGET WITH START UP FUNDING  
 2012-2017 (7-12-10 REVISION)

BEG . FUND BALANCE 7/01	ACCT NO. 12769000	Preopening	2011-2012	2012-2013 122,880.20
<b>REVENUE</b>	<b>ACCT NO.</b>	<b>FTE</b>	<b>FTE</b>	<b>FTE</b>
		<b>0</b>	<b>90</b>	<b>126</b>
FEDERAL START-UP GRANT	43290000	25,000.00	250,000.00	75,000.00
FL EDUC FINANCE PROGRAM	13310000	-	393,434.00	561,823.75
FLORIDA LEAD TEACHER	13334000	-	1,400.00	1,800.00
INSTR MATERIALS	13336000	-	7,010.00	10,010.28
DISCRETIONARY LOTTERY	13344000	-	259.00	369.85
TRANSPORTATION - FEFP	13354000	-	13,500.00	18,900.00
TRANSPORTATION - OCSB	13354000	-	-	-
CLASS SIZE REDUCTION	13355000	-	127,629.00	182,254.21
SCHOOL RECOGNITION	13361000	-	-	-
STATE STABILIZATION	13363000	-	-	-
CAPITAL OUTLAY	13397000	-	-	-
SCHOOL TAXES	13411000	-	39,328.00	56,160.38
INTEREST	13430000	-	1,000.00	1,020.00
MISC REVENUE/FUNDRAISING	13490000	7,200.00	25,000.00	25,000.00
LOAN PROCEEDS	13700000	-	-	-
<b>TOTAL REVENUE</b>		<b>32,200.00</b>	<b>858,560.00</b>	<b>932,338.48</b>
<b>TOTAL FUNDS AVAILABLE</b>		<b>32,200.00</b>	<b>858,560.00</b>	<b>1,055,218.68</b>
<b>OPERATING EXPENSES</b>				
<b>ACCOUNT NAME</b>	<b>ACCT NO.</b>			
Salaries-Teachers	15100120	-	235,000.00	318,000.00
Salaries-Paras	15100150	-	-	-
Retirement-Instructional	15100210	-	25,309.50	34,248.60
Soc Sec/Medicare-Instructional	15100220	-	17,977.50	24,327.00
Medical Insurance-Instructional	15100230	-	-	-
Workers Comp.-Instructional	15100240	-	1,762.50	2,385.00
Disability Insurance	15100290	-	-	-
Contracted Services-Instructional	15100310	-	-	-
Travel-Instructional	15100330	-	-	-
Repair & Maintenance	15100350	-	500.00	510.00
Other Purchased Services	15100390	-	-	-
Supplies-Instructional	15100510	-	4,500.00	6,300.00
Textbooks-Instructional	15100520	-	-	-
Equipment-Instructional	15100640	-	90,000.00	10,000.00
Software-Instructional	15100690	-	2,000.00	2,040.00
Dues & Fees-Instr	15100730	-	500.00	510.00
Salaries-Teachers-ESE	15500120	-	15,000.00	15,200.00
Retirement-Instructional-ESE	15500210	-	1,615.50	1,637.04
Soc Sec/Medicare-Instructional-ESE	15500220	-	1,147.50	1,162.80
Medical Insurance-Instructional-ESE	15500230	-	-	-
Workers Comp.-Instructional-ESE	15500240	-	112.50	114.00
Disability Insurance-ESE	15500290	-	-	-
Contracted Services-Instructional-ESE	15500310	-	500.00	510.00
<b>INSTRUCTIONAL</b>			<b>395,925.00</b>	<b>416,944.44</b>
Salaries-Clinic	16200130	-	-	-
Retirement-Clinic	16200210	-	-	-
Social Security-Clinic	16200220	-	-	-
Medical Insurance-Clinic	16200230	-	-	-
Workers Comp-Clinic	16200240	-	-	-
Disability Insurance	16200290	-	-	-
Supplies-Clinic	16200510	-	-	-
Equipment-Clinic	16200640	-	-	-

OPERATING EXPENSES  
ACCOUNT NAME  
PUPIL PERSONNEL SERVICES

ACCT NO.

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\_\_\_\_\_  
\_\_\_\_\_

**OPERATING EXPENSES**

<u>ACCOUNT NAME</u>	<u>ACCT NO.</u>			
Salaries-Media	16200130	-	-	-
Salaries-Media Paras	16200150	-	-	-
Retirement-Media	16200210	-	-	-
Social Security-Media	16200220	-	-	-
Medical Insurance-Media	16200230	-	-	-
Workers Comp-Media	16200240	-	-	-
Disability Insurance	16200290	-	-	-
Other Purchased Service	16200390	-	-	-
Supplies-Media	16200510	-	-	-
Periodicals	16200530	-	-	-
Library Books-Media	16200610	-	3,300.00	3,366.00
Audio-Visual-Media	16200620	-	600.00	612.00
Equipment-Media	16200640	-	-	-
Software - Media	16200690	-	1,000.00	1,020.00
<b>INSTRUCTIONAL MEDIA SVCS</b>			<b>4,900.00</b>	<b>4,998.00</b>
Contracted Services-Inservice	16400310	-	3,500.00	5,570.00
Travel - Instructional	16400330	-	500.00	710.00
Supplies	16400510	-	-	-
<b>INSTR STAFF TRNG SVCS</b>			<b>4,000.00</b>	<b>6,280.00</b>
Group Insurance	17100230	-	-	-
Unemployment Comp	17100250	-	-	-
Short Term Disability	17100290	-	-	-
Contracted Services-Admin/Gov/Audit	17100310	-	10,500.00	11,500.00
Contracted Services-Legal	17100311	-	-	-
Liability Insurance-Charter Board	17100320	-	6,500.00	6,630.00
Student Insurance-Charter Board	17100321	-	-	-
Travel-Charter Board	17100330	-	-	-
Postage Board	17100370	-	-	-
Other Services - Board	17100390	-	-	-
Supplies - Board	17100510	-	-	-
Dues & Fees-Board	17100730	2,500.00	200.00	204.00
<b>BOARD</b>		<b>2,500.00</b>	<b>17,200.00</b>	<b>18,334.00</b>
Salaries-Administration	17300110	-	75,000.00	76,500.00
Salaries-Admn. Para	17300150	-	-	-
Salaries-Admn. Sec.	17300160	-	20,000.00	20,400.00
Retirement-Admin	17300210	-	10,231.50	10,436.13
Soc. Sec./Medicare-Admin	17300220	-	7,267.50	7,412.85
Medical Insurance-Admin	17300230	-	-	-
Workers Comp-Admin	17300240	-	712.50	726.75
Disability Insurance	17300290	-	-	-
Travel-Admin	17300330	-	200.00	204.00
Repair & Maintenance	17300350	-	-	-
Postage	17300370	200.00	100.00	102.00
Other Purchased Svcs-Admin	17300390	5,000.00	-	-
Supplies-Admin	17300510	-	1,500.00	1,530.00
Equipment-Admin	17300640	-	3,000.00	500.00
Software-Admin	17300690	-	400.00	200.00
Dues & Fees-Admin	17300730	-	200.00	204.00
Salary- Sub Admin Sec	17300750	-	-	-
Misc Expense	17300790	3,500.00	-	-
OCPS Admin Cost	17300791	-	29,058.00	41,475.92
<b>SCHOOL ADM (OFFICE OF PRIN)</b>		<b>8,700.00</b>	<b>147,669.50</b>	<b>159,891.65</b>
Buildings - Down Payment/Loan Costs	17400630	-	-	100,000.00
<b>FACILITIES ACQUISITION</b>				<b>100,000.00</b>
Contracted Services-Fiscal	17500310	3,000.00	6,000.00	6,000.00
Contracted Services-Payroll Processing	17500311	-	1,500.00	1,530.00
Contracted Services - Cornerstone/FLEX	17500312	-	-	-
<b>FISCAL SERVICES</b>		<b>3,000.00</b>	<b>7,500.00</b>	<b>7,530.00</b>




**OPERATING EXPENSES**

<b>ACCOUNT NAME</b>	<b>ACCT NO.</b>			
Salaries-Transportation	17800160	-	9,000.00	9,180.00
Retirement-Transportation	17800210	-	969.30	988.89
Soc. Sec.-Transportation	17800220	-	688.50	702.27
Insurance-Transportation	17800230	-	-	-
Workers Comp-Transportation	17800240	-	67.50	68.85
Disability Insurance	17800290	-	-	-
Vehicle Insurance-Transportation	17800320	-	3,000.00	3,060.00
Student Insurance	17800321	-	360.00	504.00
Repair & Maint	17800350	-	2,500.00	2,550.00
Contracted Services-Transportation	17800390	-	600.00	612.00
Gasoline	17800450	-	3,500.00	3,570.00
<b>TRANSPORTATION</b>		<b>-</b>	<b>20,685.30</b>	<b>21,235.81</b>
Salaries-Custodial	17900160	-	-	-
Retirement-Custodian	17900210	-	-	-
Soc. Sec.-Custodian	17900220	-	-	-
Insurance-Custodian	17900230	-	-	-
Workers Comp-Custodian	17900240	-	-	-
Disability Insurance	17900290	-	-	-
Bldg Insurance-Operations	17900320	-	15,000.00	15,300.00
Vehicle Insurance-Operations	17900321	-	-	-
Repair & Maint	17900350	-	1,000.00	1,020.00
Rental - Operations (or Mortgage Debt Service)	17900360	18,000.00	98,400.00	100,368.00
Telephone	17900370	-	3,000.00	3,060.00
Pagers	17900371	-	-	-
Water, Sewage and Garbage	17900380	-	1,200.00	1,713.60
Contracted Services-Operations	17900390	-	-	-
Contracted Services-Custodial	17900391	-	10,000.00	10,200.00
Contracted Services-Security	17900392	-	-	-
Contracted Services - Truck Maint.	17900393	-	-	-
Utilities	17900400	-	5,000.00	7,140.00
Gasoline	17900450	-	-	-
Supplies-Operations	17900510	-	4,200.00	5,997.60
Equipment -Operations	17900640	-	-	-
Motor Vehicles	17900650	-	-	-
Misc. Exp	17900790	-	-	-
<b>OPERATION OF PLANT</b>		<b>18,000.00</b>	<b>137,800.00</b>	<b>144,799.20</b>
Principal - Debt	19200710	-	-	-
Interest - Debt	19200720	-	-	-
<b>DEBT SERVICE</b>		<b>-</b>	<b>-</b>	<b>-</b>
<b>TOTAL OPERATING EXPENSES</b>		<b>32,200.00</b>	<b>735,679.80</b>	<b>879,813.10</b>
<b>CURRENT YEAR NET INCOME(LOSS)</b>		<b>-</b>	<b>122,880.20</b>	<b>52,525.38</b>
<b>ENDING FUND BALANCE 6/30</b>		<b>-</b>	<b>122,880.20</b>	<b>175,405.58</b>

Revenue Increase 102.00%  
 Salary Increase 102.00%  
 Inflation 102.00%

<u>2013-2014</u>	<u>2014-2015</u>	<u>2015-2016</u>	
<b>175,405.58</b>	<b>179,565.21</b>	<b>180,894.81</b>	
<u>FTE</u> <u>162</u>	<u>FTE</u> <u>198</u>	<u>FTE</u> <u>234</u>	
-	-	-	Per OCPS: expected amount of grant.
736,791.72	918,533.68	1,107,250.60	Per the attached FEFP spreadsheet for Year 1 and increasing 2% per year.
2,400.00	2,800.00	3,400.00	Amount of teacher supplies allocation provided by the school district.
13,127.77	18,385.95	19,728.41	Per the attached FEFP spreadsheet.
485.03	604.68	728.91	Per the attached FEFP spreadsheet.
24,300.00	29,700.00	35,100.00	Estimated allocation of \$450 per student.
-	-	-	
239,013.38	297,970.01	359,189.31	Per the attached FEFP spreadsheet.
-	-	-	
-	72,000.00	73,440.00	Capital outlay funding starts in year 4.
73,650.33	91,817.41	110,681.72	Per the attached FEFP spreadsheet.
1,040.40	1,081.21	1,082.43	Estimated bank account interest.
25,000.00	25,000.00	25,000.00	Estimated amount of private funding and fundraisers.
-	-	-	
<b>1,115,808.64</b>	<b>1,455,852.94</b>	<b>1,735,601.38</b>	
<b>1,291,214.22</b>	<b>1,635,418.15</b>	<b>1,916,496.19</b>	
432,000.00	524,000.00	649,000.00	Salaries based upon the teacher count on the enrollment projection. 5 teachers @ \$37K; 2 assist
-	-	-	
46,526.40	56,434.80	69,897.30	Florida Retirement System payments for instructional staff.
33,048.00	40,086.00	49,648.50	Payroll taxes for teachers and assistants.
-	-	-	
3,240.00	3,930.00	4,867.50	Workers' compensation insurance for teachers and assistants.
-	-	-	
-	-	-	
1,040.40	1,081.21	1,082.43	Repair and maint on classroom equipment.
-	-	-	
8,100.00	13,900.00	17,700.00	Estimated at \$50 per student. Added testing supplies for SAT10 in years 4-5.
-	-	-	
60,000.00	30,000.00	20,000.00	Estimated at \$30,000 per new classroom. Added \$10K in year 2 and \$20K in year 5 to replace us
3,121.20	3,183.82	3,247.30	
520.20	530.60	541.22	Fees for instructional licenses/fees.
15,500.00	16,000.00	16,500.00	Salary for part time ESE teacher.
1,669.35	1,723.20	1,777.05	Florida Retirement System payments for ESE teacher.
1,185.75	1,224.00	1,282.25	Payroll taxes for ESE teacher.
-	-	-	
116.25	120.00	123.75	Workers' compensation insurance for ESE teacher.
-	-	-	
520.20	530.60	541.22	Therapy services for ESE students.
<b>606,587.75</b>	<b>692,724.04</b>	<b>836,188.51</b>	
-	20,000.00	20,400.00	Added clinic in year 4.
-	-	-	
-	1,530.00	1,560.60	Added clinic in year 4.
-	-	-	
-	150.00	153.00	Added clinic in year 4.
-	-	-	
-	1,000.00	1,020.00	Added clinic in year 4.
-	5,000.00	5,100.00	Added clinic in year 4.



-	27,680.00	28,233.60
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-	-	-	
-	-	-	
-	-	-	
-	-	-	
-	-	-	
4,119.98	10,000.00	10,200.00	Classroom reference materials, added library in year 4.
749.09	2,500.00	2,550.00	Classroom AV materials, added library in year 4.
-	-	-	
1,248.48	3,000.00	3,060.00	Classroom reference software, added library in year 4.
<u>6,117.55</u>	<u>15,500.00</u>	<u>15,810.00</u>	
11,362.80	16,590.06	16,921.86	Teacher training offered--more seminars and offsite training starting in year 3.
1,448.40	3,477.37	3,546.92	Teacher training offered--more seminars and offsite training starting in year 3.
-	-	-	
<u>12,811.20</u>	<u>20,067.42</u>	<u>20,468.77</u>	
-	-	-	
-	-	-	
11,730.00	12,500.00	12,750.00	Cost of the annual audit.
-	-	-	
6,762.60	6,897.85	7,035.81	Directors & officers (errors and omissions) insurance.
-	-	-	
-	-	-	
208.08	212.24	216.49	Incorporation and annual report fees.
<u>18,700.68</u>	<u>19,810.09</u>	<u>20,002.30</u>	
80,000.00	85,000.00	90,000.00	Director salary.
-	20,000.00	20,400.00	Added admin para in year 4 for filing and reception.
21,000.00	22,000.00	23,000.00	Administrative secretary salary.
10,877.70	13,877.90	14,367.18	Florida Retirement System payments for admin staff.
7,726.50	8,185.50	8,644.50	Payroll taxes for admin staff.
-	-	-	
741.29	756.11	771.23	Workers' compensation for admin staff.
-	-	-	
208.08	212.24	216.49	Travel for admin staff.
-	-	-	
104.04	106.12	108.24	Postage for parent mailings, checks, etc.
-	-	-	
1,560.60	1,591.81	1,623.65	Office supplies.
510.00	520.20	530.60	Computers and office equipment.
204.00	208.08	212.24	Office software: accounting and business software.
208.08	212.24	216.49	
-	-	-	
-	-	-	
54,368.41	67,749.59	81,633.95	District 5% admin fee.
<u>177,508.70</u>	<u>220,219.79</u>	<u>241,724.57</u>	
100,000.00	-	-	
<u>100,000.00</u>	-	-	
6,000.00	8,500.00	8,500.00	Contract accountant services.
3,121.20	3,183.62	3,247.30	ADP payroll processing fees.
-	-	-	
<u>9,121.20</u>	<u>9,683.62</u>	<u>9,747.30</u>	

9,363.60	9,550.87	9,741.89	Salary for one bus driver.
1,008.48	1,028.63	1,049.20	Florida Retirement System payments for bus driver.
716.32	730.64	745.25	Payroll taxes for bus driver.
-	-	-	
70.23	71.63	73.06	Workers' compensation insurance for bus driver.
-	-	-	
3,121.20	3,183.62	3,247.30	Insurance for bus and accident insurance.
648.00	792.00	836.00	Student accident insurance.
2,601.00	2,653.02	2,708.08	Repairs/tires for bus.
624.24	636.72	649.46	OCPS inspection services.
3,641.40	3,714.23	3,788.51	Diesel fuel for bus at District depot.
<u>21,794.44</u>	<u>22,361.37</u>	<u>22,936.76</u>	
-	20,000.00	20,400.00	Added custodian in year 4.
-	2,154.00	2,197.08	Florida Retirement System payments for custodial staff.
-	1,530.00	1,560.60	Added custodian in year 4.
-	-	-	
-	150.00	153.00	Added custodian in year 4.
-	-	-	
15,606.00	39,795.30	40,591.21	Liability and property insurance. Added second building in year 4.
-	-	-	
6,000.00	12,000.00	20,000.00	Maintenance on buildings and grounds.
104,400.00	320,400.00	320,400.00	Rent or mortgage payment for buildings. Added second building in year 4.
3,121.20	6,367.25	6,494.59	Telephone service for entire school.
-	-	-	
2,247.26	2,801.59	3,377.19	Water and sewer usage. Ramped up as enrollment increases.
-	-	-	
10,404.00	-	-	Outside custodial services.
-	-	-	
9,363.60	11,673.29	14,071.62	Electricity usage. Ramped up as enrollment increases.
-	-	-	
7,865.42	9,805.56	11,820.16	Operations supplies usage. Ramped up as enrollment increases.
-	-	-	
-	-	-	
<u>159,007.49</u>	<u>426,676.99</u>	<u>441,065.44</u>	
-	-	-	
-	-	-	
<u>1,111,649.01</u>	<u>1,454,523.33</u>	<u>1,636,177.25</u>	
<u>4,159.63</u>	<u>1,329.61</u>	<u>99,424.13</u>	
<u>179,565.21</u>	<u>180,894.81</u>	<u>280,318.94</u>	

WEST ORANGE MONTESSORI CHARTER SCHOOL  
 PROJECTED OPERATING BUDGET WITHOUT START UP FUNDING  
 2012-2017 (7-12-10 REVISION)

BEG . FUND BALANCE 7/01	ACCT NO. 12769000	Preopening	2011-2012	2012-2013	2013-2014
				32,001.20	38,835.26
<b>REVENUE</b>	<b>ACCT NO.</b>	<b>FTE</b>	<b>FTE</b>	<b>FTE</b>	<b>FTE</b>
		<b>0</b>	<b>90</b>	<b>128</b>	<b>162</b>
FEDERAL START-UP GRANT	43290000	-	-	-	-
FL EDUC FINANCE PROGRAM	13310000	-	393,434.00	561,823.75	736,791.72
FLORIDA LEAD TEACHER	13334000	-	1,400.00	1,800.00	2,400.00
INSTR MATERIALS	13336000	-	7,010.00	10,010.28	13,127.77
DISCRETIONARY LOTTERY	13344000	-	259.00	369.85	485.03
TRANSPORTATION - FEFP	13354000	-	13,500.00	18,900.00	24,300.00
TRANSPORTATION - OCSB	13354000	-	-	-	-
CLASS SIZE REDUCTION	13355000	-	127,629.00	182,254.21	239,013.38
SCHOOL RECOGNITION	13361000	-	-	-	-
STATE STABILIZATION	13363000	-	-	-	-
CAPITAL OUTLAY	13397000	-	-	-	-
SCHOOL TAXES	13411000	-	39,328.00	56,180.38	73,650.33
INTEREST	13430000	-	1,000.00	1,020.00	1,040.40
MISC REVENUE/FUNDRAISING	13490000	20,700.00	35,000.00	25,000.00	25,000.00
LOAN PROCEEDS	13700000	-	-	-	-
<b>TOTAL REVENUE</b>		<b>20,700.00</b>	<b>618,560.00</b>	<b>857,338.48</b>	<b>1,115,808.64</b>
<b>TOTAL FUNDS AVAILABLE</b>		<b>20,700.00</b>	<b>618,560.00</b>	<b>889,339.68</b>	<b>1,154,643.90</b>
<b>OPERATING EXPENSES</b>					
<b>ACCOUNT NAME</b>	<b>ACCT NO.</b>				
Salaries-Teachers	15100120	-	235,000.00	318,000.00	432,000.00
Salaries-Paras	15100150	-	-	-	-
Retirement-Instructional	15100210	-	-	34,248.60	46,526.40
Soc Sec/Medicare-Instructional	15100220	-	17,977.50	24,327.00	33,048.00
Medical Insurance-Instructional	15100230	-	-	-	-
Workers Comp.-Instructional	15100240	-	1,762.50	2,385.00	3,240.00
Disability Insurance	15100290	-	-	-	-
Contracted Services-Instructional	15100310	-	-	-	-
Travel-Instructional	15100330	-	-	-	-
Repair & Maintenance	15100350	-	500.00	510.00	1,040.40
Other Purchased Services	15100390	-	-	-	-
Supplies-Instructional	15100510	-	4,500.00	6,300.00	8,100.00
Textbooks-Instructional	15100520	-	-	-	-
Equipment-Instructional	15100640	-	10,000.00	10,000.00	60,000.00
Software-Instructional	15100690	-	2,000.00	2,040.00	3,121.20
Dues & Fees-Instr	15100730	-	500.00	510.00	520.20
Salaries-Teachers-ESE	15500120	-	15,000.00	15,200.00	15,500.00
Retirement-Instructional-ESE	15500210	-	1,615.50	1,637.04	1,669.35
Soc Sec/Medicare-Instructional-ESE	15500220	-	1,147.50	1,162.80	1,185.75
Medical Insurance-Instructional-ESE	15500230	-	-	-	-
Workers Comp.-Instructional-ESE	15500240	-	112.50	114.00	116.25
Disability Insurance-ESE	15500290	-	-	-	-
Contracted Services-Instructional-ESE	15500310	-	500.00	510.00	520.20
<b>INSTRUCTIONAL</b>			<b>290,615.50</b>	<b>416,944.44</b>	<b>606,587.75</b>

**OPERATING EXPENSES**

<b>ACCOUNT NAME</b>	<b>ACCT NO.</b>				
Salaries-Clinic	16200130	-	-	-	-
Retirement-Media	16200210	-	-	-	-
Social Security-Media	16200220	-	-	-	-
Medical Insurance-Media	16200230	-	-	-	-
Workers Comp-Media	16200240	-	-	-	-
Disability Insurance	16200290	-	-	-	-
Supplies-Clinic	16200510	-	-	-	-
Equipment-Clinic	16200640	-	-	-	-
<b>PUPIL PERSONNEL SERVICES</b>		<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
Salaries-Media	16200130	-	-	-	-
Salaries-Media Paras	16200150	-	-	-	-
Retirement-Media	16200210	-	-	-	-
Social Security-Media	16200220	-	-	-	-
Medical Insurance-Media	16200230	-	-	-	-
Workers Comp-Media	16200240	-	-	-	-
Disability Insurance	16200290	-	-	-	-
Other Purchased Service	16200390	-	-	-	-
Supplies-Media	16200510	-	-	-	-
Periodicals	16200530	-	-	-	-
Library Books-Media	16200610	-	-	-	-
Audio-Visual-Media	16200620	-	-	-	-
Equipment-Media	16200640	-	-	-	-
Software - Media	16200690	-	-	-	-
<b>INSTRUCTIONAL MEDIA SVCS</b>		<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
Contracted Services-Inservice	16400310	-	-	5,570.00	11,362.80
Travel - Instructional	16400330	-	-	710.00	1,448.40
Supplies	16400510	-	-	-	-
<b>INSTR STAFF TRNG SVCS</b>		<b>-</b>	<b>-</b>	<b>6,280.00</b>	<b>12,811.20</b>
Group Insurance	17100230	-	-	-	-
Unemployment Comp	17100250	-	-	-	-
Short Term Disability	17100290	-	-	-	-
Contracted Services-Admin/Gov/Audit	17100310	-	10,500.00	11,500.00	11,730.00
Contracted Services-Legal	17100311	-	-	-	-
Liability Insurance-Charter Board	17100320	-	6,500.00	6,630.00	6,762.60
Student Insurance-Charter Board	17100321	-	-	-	-
Travel-Charter Board	17100330	-	-	-	-
Postage Board	17100370	-	-	-	-
Other Services - Board	17100390	-	-	-	-
Supplies - Board	17100510	-	-	-	-
Dues & Fees-Board	17100730	-	-	-	-
<b>BOARD</b>		<b>2,500.00</b>	<b>200.00</b>	<b>204.00</b>	<b>208.08</b>
		<b>2,500.00</b>	<b>17,200.00</b>	<b>18,334.00</b>	<b>18,700.88</b>
Salaries-Administration	17300110	-	75,000.00	76,500.00	80,000.00
Salaries-Admn. Para	17300150	-	-	-	-
Salaries-Admn. Sec.	17300160	-	-	-	21,000.00
Retirement-Admin	17300210	-	-	8,239.05	10,877.70
Soc. Sec./Medicare-Admin	17300220	-	5,737.50	5,852.25	7,726.50
Medical Insurance-Admin	17300230	-	-	-	-
Workers Comp-Admin	17300240	-	562.50	573.75	585.23
Disability Insurance	17300290	-	-	-	-
Travel-Admin	17300330	-	200.00	204.00	208.08
Repair & Maintenance	17300350	-	-	-	-
Postage	17300370	200.00	100.00	102.00	104.04
Other Purchased Svcs-Admin	17300390	-	-	-	-
Supplies-Admin	17300510	-	1,500.00	1,530.00	1,560.60
Equipment-Admin	17300640	-	-	500.00	510.00
Software-Admin	17300690	-	400.00	200.00	204.00
Dues & Fees-Admin	17300730	-	200.00	204.00	208.08
Salary- Sub Admin Sec	17300750	-	-	-	-
Misc Expense	17300790	-	-	-	-
OCPs Admin Cost	17300791	-	29,056.00	41,475.92	54,366.41
<b>SCHOOL ADM (OFFICE OF PRIN)</b>		<b>200.00</b>	<b>112,756.00</b>	<b>135,380.97</b>	<b>177,352.64</b>
Buildings - Down Payment/Loan Costs	17400630	-	-	100,000.00	100,000.00
<b>FACILITIES ACQUISITION</b>		<b>-</b>	<b>-</b>	<b>100,000.00</b>	<b>100,000.00</b>
Contracted Services-Fiscal	17500310	-	6,000.00	6,000.00	6,000.00
Contracted Services-Payroll Processing	17500311	-	1,500.00	1,530.00	3,121.20
Contracted Services - Cornerstone/FLEX	17500312	-	-	-	-
<b>FISCAL SERVICES</b>		<b>-</b>	<b>7,500.00</b>	<b>7,530.00</b>	<b>9,121.20</b>
Salaries-Transportation	17800160	-	9,000.00	9,180.00	9,363.60
Retirement-Transportation	17800210	-	969.30	988.69	1,008.46

**OPERATING EXPENSES**

<u>ACCOUNT NAME</u>	<u>ACCT NO.</u>				
Soc. Sec.-Transportation	17800220	-	688.50	702.27	716.32
Insurance-Transportation	17800230	-	-	-	-
Workers Comp-Transportation	17800240	-	67.50	68.85	70.23
Disability Insurance	17800290	-	-	-	-
Vehicle Insurance-Transportation	17800320	-	3,000.00	3,060.00	3,121.20
Student Insurance	17800321	-	360.00	504.00	648.00
Repair & Maint	17800350	-	2,500.00	2,550.00	2,601.00
Contracted Services-Transportation	17800390	-	600.00	612.00	624.24
Gasoline	17800450	-	3,500.00	3,570.00	3,641.40
<b>TRANSPORTATION</b>		-	<b>20,685.30</b>	<b>21,235.81</b>	<b>21,794.44</b>
Salaries-Custodial	17900160	-	-	-	-
Retirement-Custodian	17900210	-	-	-	-
Soc. Sec.-Custodian	17900220	-	-	-	-
Insurance-Custodian	17900230	-	-	-	-
Workers Comp-Custodian	17900240	-	-	-	-
Disability Insurance	17900290	-	-	-	-
Bldg Insurance-Operations	17900320	-	15,000.00	15,300.00	15,606.00
Vehicle Insurance-Operations	17900321	-	-	-	-
Repair & Maint	17900350	-	1,000.00	1,020.00	6,000.00
Rental - Operations (or Mortgage Debt Service)	17900360	18,000.00	98,400.00	100,368.00	104,400.00
Telephone	17900370	-	3,000.00	3,060.00	3,121.20
Pagers	17900371	-	-	-	-
Water, Sewage and Garbage	17900380	-	1,200.00	1,713.60	2,247.26
Contracted Services-Operations	17900390	-	-	-	-
Contracted Services-Custodial	17900391	-	10,000.00	10,200.00	10,404.00
Contracted Services-Security	17900392	-	-	-	-
Contracted Services - Truck Maint.	17900393	-	-	-	-
Utilities	17900400	-	5,000.00	7,140.00	9,363.60
Gasoline	17900450	-	-	-	-
Supplies-Operations	17900510	-	4,200.00	5,997.60	7,865.42
Equipment -Operations	17900640	-	-	-	-
Motor Vehicles	17900650	-	-	-	-
Misc.Exp	17900780	-	-	-	-
<b>OPERATION OF PLANT</b>		<b>18,000.00</b>	<b>137,800.00</b>	<b>144,799.20</b>	<b>159,007.49</b>
Principal - Debt	19200710	-	-	-	-
Interest - Debt	19200720	-	-	-	-
<b>DEBT SERVICE</b>		-	-	-	-
<b>TOTAL OPERATING EXPENSES</b>		<b>20,700.00</b>	<b>586,558.80</b>	<b>650,504.42</b>	<b>1,105,375.40</b>
<b>CURRENT YEAR NET INCOME(LOSS)</b>		<b>-</b>	<b>32,001.20</b>	<b>6,834.06</b>	<b>10,433.24</b>
<b>ENDING FUND BALANCE 6/30</b>		<b>-</b>	<b>32,001.20</b>	<b>38,835.26</b>	<b>49,268.50</b>



Revenue Increase 102.00%  
 Salary Increase 102.00%  
 Inflation 102.00%

2014-2015  
 49,268.50

2015-2016  
 50,767.29

<u>FTE</u> <u>198</u>	<u>FTE</u> <u>234</u>	
918,533.68	1,107,250.60	Adjustments for No Start Up Funding:
2,800.00	3,400.00	Year 1:
16,365.95	19,728.41	→ Eliminate retirement benefits.
504.68	728.91	→ Reduce the amount of classroom set-up charges. Will obtain free or reduced-price items.
29,700.00	35,100.00	→ Eliminate staff training.
-	-	→ Add \$10,000 of fundraising.
297,970.01	359,189.31	→ Eliminate new equipment for admin in year 1.
-	-	→ Eliminate administrative assistant in years 1 and 2.
-	-	→ Eliminate classroom reference materials in years 1-3. Will obtain donated materials.
72,000.00	73,440.00	
91,817.41	110,681.72	
1,061.21	1,082.43	
25,000.00	25,000.00	
<u>1,455,852.94</u>	<u>1,735,601.38</u>	
<u>1,505,121.44</u>	<u>1,786,358.66</u>	
524,000.00	649,000.00	
-	-	
56,434.80	69,697.30	
40,086.00	49,648.50	
-	-	
3,930.00	4,667.50	
-	-	
-	-	
1,061.21	1,082.43	
-	-	
13,900.00	17,700.00	
-	-	
30,000.00	20,000.00	
3,183.62	3,247.30	
530.60	541.22	
16,000.00	16,500.00	
1,723.20	1,777.05	
1,224.00	1,262.25	
-	-	
120.00	123.75	
-	-	
530.60	541.22	
<u>692,724.04</u>	<u>836,188.61</u>	

20,000.00	20,400.00
-	-
1,530.00	1,560.60
-	-
150.00	153.00
-	-
1,000.00	1,020.00
5,000.00	5,100.00
<u>27,680.00</u>	<u>28,233.60</u>
-	-
-	-
-	-
-	-
-	-
-	-
-	-
10,000.00	10,200.00
2,500.00	2,550.00
-	-
3,000.00	3,060.00
<u>15,500.00</u>	<u>15,810.00</u>
16,590.08	16,921.86
3,477.37	3,546.92
-	-
<u>20,067.42</u>	<u>20,468.77</u>
-	-
-	-
-	-
12,500.00	12,750.00
-	-
6,897.85	7,035.81
-	-
-	-
-	-
212.24	216.49
<u>19,610.09</u>	<u>20,002.30</u>
85,000.00	90,000.00
20,000.00	20,400.00
22,000.00	23,000.00
13,677.90	14,367.18
8,185.50	8,644.50
-	-
596.93	608.87
-	-
212.24	216.49
-	-
106.12	108.24
-	-
1,591.81	1,623.65
520.20	530.60
208.08	212.24
212.24	216.49
-	-
-	-
67,749.59	81,633.85
<u>220,060.61</u>	<u>241,562.21</u>
-	-
-	-
6,500.00	6,500.00
3,183.62	3,247.30
-	-
<u>9,683.62</u>	<u>9,747.30</u>
9,550.87	9,741.89
1,028.63	1,049.20

730.64	745.25
-	-
71.63	73.06
-	-
3,183.62	3,247.30
792.00	936.00
2,653.02	2,706.08
636.72	649.46
3,714.23	3,788.51
<u>22,361.37</u>	<u>22,936.76</u>
20,000.00	20,400.00
2,154.00	2,197.08
1,530.00	1,560.60
-	-
150.00	153.00
-	-
39,795.30	40,591.21
-	-
12,000.00	20,000.00
320,400.00	320,400.00
6,367.25	6,494.59
-	-
2,601.59	3,377.19
-	-
-	-
-	-
11,673.29	14,071.62
-	-
9,805.56	11,820.16
-	-
-	-
<u>426,676.99</u>	<u>441,065.44</u>
-	-
-	-
-	-
<u>1,454,384.15</u>	<u>1,636,014.86</u>
<u>1,488.79</u>	<u>99,586.49</u>
<u>50,757.29</u>	<u>150,343.78</u>

WEST ORANGE MONTESSORI CHARTER SCHOOL  
 SENSITIVITY ANALYSIS FOR YEAR ONE WITHOUT START UP GRANT  
 2011-2012

BEG . FUND BALANCE 7/01	ACCT NO. 12769000	2011-2012	2011-2012	2011-2012
		5 Classrooms FTE 90	3 Classrooms FTE 84	2 Classrooms FTE 38
REVENUE	ACCT NO.			
FEDERAL START-UP GRANT	43290000	-	-	-
FL EDUC FINANCE PROGRAM	13310000	393,434.00	236,060.40	157,373.60
FLORIDA LEAD TEACHER	13334000	1,400.00	600.00	400.00
INSTR MATERIALS	13336000	7,010.00	4,206.00	2,804.00
DISCRETIONARY LOTTERY	13344000	259.00	155.40	103.60
TRANSPORTATION - FEFP	13354000	13,500.00	8,100.00	5,400.00
TRANSPORTATION - OCSB	13354000	-	-	-
CLASS SIZE REDUCTION	13355000	127,629.00	76,577.40	51,051.60
SCHOOL RECOGNITION	13361000	-	-	-
STATE STABILIZATION	13363000	-	-	-
CAPITAL OUTLAY	13397000	-	-	-
SCHOOL TAXES	13411000	39,326.00	23,596.80	15,731.20
INTEREST	13430000	1,000.00	1,000.00	1,000.00
MISC REVENUE/FUNDRAISING	13490000	35,000.00	35,000.00	35,000.00
LOAN PROCEEDS	13700000	-	-	-
<b>TOTAL REVENUE</b>		<b>618,560.00</b>	<b>385,296.00</b>	<b>268,864.00</b>
<b>TOTAL FUNDS AVAILABLE</b>		<b>618,560.00</b>	<b>385,296.00</b>	<b>268,864.00</b>

## OPERATING EXPENSES

ACCOUNT NAME	ACCT NO.	2011-2012	2011-2012	2011-2012
Salaries-Teachers	15100120	235,000.00	111,000.00	70,000.00
Salaries-Paras	15100150	-	-	-
Retirement-Instructional	15100210	-	-	-
Soc Sec/Medicare-Instructional	15100220	17,977.50	8,491.50	5,355.00
Medical Insurance-Instructional	15100230	-	-	-
Workers Comp.-Instructional	15100240	1,762.50	832.50	525.00
Disability Insurance	15100290	-	-	-
Contracted Services-Instructional	15100310	-	-	-
Travel-Instructional	15100330	-	-	-
Repair & Maintenance	15100350	500.00	300.00	200.00
Other Purchased Services	15100390	-	-	-
Supplies-Instructional	15100510	4,500.00	2,700.00	1,800.00
Textbooks-Instructional	15100520	-	-	-
Equipment-Instructional	15100640	10,000.00	6,000.00	4,000.00
Software-Instructional	15100690	2,000.00	1,200.00	800.00
Dues & Fees-Instr	15100730	500.00	300.00	200.00
Salaries-Teachers-ESE	15500120	15,000.00	9,000.00	6,000.00
Retirement-Instructional-ESE	15500210	1,615.50	969.30	646.20
Soc Sec/Medicare-Instructional-ESE	15500220	1,147.50	688.50	459.00
Medical Insurance-Instructional-ESE	15500230	-	-	-
Workers Comp.-Instructional-ESE	15500240	112.50	67.50	45.00
Disability Insurance-ESE	15500290	-	-	-
Contracted Services-Instructional-ESE	15500310	500.00	300.00	200.00
<b>INSTRUCTIONAL</b>		<b>290,815.50</b>	<b>141,849.30</b>	<b>90,230.20</b>

Less staff required, reduct

**OPERATING EXPENSES**

<u>ACCOUNT NAME</u>	<u>ACCT NO.</u>				
Salaries-Clinic	16200130	-	-	-	-
Retirement-Media	16200210	-	-	-	-
Social Security-Media	16200220	-	-	-	-
Medical Insurance-Media	16200230	-	-	-	-
Workers Comp-Media	16200240	-	-	-	-
Disability Insurance	16200290	-	-	-	-
Supplies-Clinic	16200510	-	-	-	-
Equipment-Clinic	16200640	-	-	-	-
<b>PUPIL PERSONNEL SERVICES</b>		<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
Salaries-Media	16200130	-	-	-	-
Salaries-Media Paras	16200150	-	-	-	-
Retirement-Media	16200210	-	-	-	-
Social Security-Media	16200220	-	-	-	-
Medical Insurance-Media	16200230	-	-	-	-
Workers Comp-Media	16200240	-	-	-	-
Disability Insurance	16200290	-	-	-	-
Other Purchased Service	16200390	-	-	-	-
Supplies-Media	16200510	-	-	-	-
Periodicals	16200530	-	-	-	-
Library Books-Media	16200610	-	-	-	-
Audio-Visual-Media	16200620	-	-	-	-
Equipment-Media	16200640	-	-	-	-
Software - Media	16200690	-	-	-	-
<b>INSTRUCTIONAL MEDIA SVCS</b>		<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
Contracted Services-Inservice	16400310	-	-	-	-
Travel - Instructional	16400330	-	-	-	-
Supplies	16400510	-	-	-	-
<b>INSTR STAFF TRNG SVCS</b>		<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
Group Insurance	17100230	-	-	-	-
Unemployment Comp	17100250	-	-	-	-
Short Term Disability	17100290	-	-	-	-
Contracted Services-Admin/Gov/Audit	17100310	10,500.00	10,500.00	10,500.00	
Contracted Services-Legal	17100311	-	-	-	-
Liability Insurance-Charter Board	17100320	6,500.00	6,500.00	6,500.00	
Student Insurance-Charter Board	17100321	-	-	-	-
Travel-Charter Board	17100330	-	-	-	-
Postage Board	17100370	-	-	-	-
Other Services - Board	17100390	-	-	-	-
Supplies - Board	17100510	-	-	-	-
Dues & Fees-Board	17100730	200.00	200.00	200.00	
<b>BOARD</b>		<b>17,200.00</b>	<b>17,200.00</b>	<b>17,200.00</b>	
Salaries-Administration	17300110	75,000.00	60,000.00	45,000.00	Reduce Director salary.
Salaries-Admn. Para	17300150	-	-	-	-
Salaries-Admn. Sec.	17300160	-	-	-	-
Retirement-Admin	17300210	-	-	-	-
Soc. Sec./Medicare-Admin	17300220	5,737.50	4,590.00	3,442.50	
Medical Insurance-Admin	17300230	-	-	-	-
Workers Comp-Admin	17300240	562.50	450.00	337.50	
Disability Insurance	17300290	-	-	-	-
Travel-Admin	17300330	200.00	200.00	200.00	
Repair & Maintenance	17300350	-	-	-	-
Postage	17300370	100.00	100.00	100.00	
Other Purchased Svcs-Admin	17300390	-	-	-	-
Supplies-Admin	17300510	1,500.00	900.00	600.00	
Equipment-Admin	17300640	-	2,000.00	2,000.00	
Software-Admin	17300690	400.00	400.00	400.00	
Dues & Fees-Admin	17300730	200.00	200.00	200.00	
Salary- Sub Admin Sec	17300750	-	-	-	-
Misc Expense	17300790	-	-	-	-
OCPs Admin Cost	17300791	29,058.00	17,434.80	11,623.20	
<b>SCHOOL ADM (OFFICE OF PRIN)</b>		<b>112,758.00</b>	<b>86,274.80</b>	<b>63,903.20</b>	
Buildings - Down Payment/Loan Costs	17400830	-	-	-	-
<b>FACILITIES ACQUISITION</b>		<b>-</b>	<b>-</b>	<b>-</b>	
Contracted Services-Fiscal	17500310	6,000.00	6,000.00	6,000.00	
Contracted Services-Payroll Processing	17500311	1,500.00	1,500.00	1,500.00	
Contracted Services - Cornerstone/FLEX	17500312	-	-	-	-
<b>FISCAL SERVICES</b>		<b>7,500.00</b>	<b>7,500.00</b>	<b>7,500.00</b>	
Salaries-Transportation	17800160	9,000.00	9,000.00	9,000.00	
Retirement-Transportation	17800210	969.30	969.30	969.30	

**OPERATING EXPENSES**

<u>ACCOUNT NAME</u>	<u>ACCT NO.</u>			
Soc. Sec.-Transportation	17800220	688.50	688.50	688.50
Insurance-Transportation	17800230	-	-	-
Workers Comp-Transportation	17800240	67.50	67.50	67.50
Disability Insurance	17800290	-	-	-
Vehicle Insurance-Transportation	17800320	3,000.00	3,000.00	3,000.00
Student Insurance	17800321	360.00	216.00	144.00
Repair & Maint	17800350	2,500.00	2,500.00	2,500.00
Contracted Services-Transportation	17800390	600.00	600.00	600.00
Gasoline	17800450	3,500.00	3,500.00	3,500.00
<b>TRANSPORTATION</b>		<b>20,685.30</b>	<b>20,541.30</b>	<b>20,469.30</b>
Salaries-Custodial	17900160	-	-	-
Retirement-Custodian	17900210	-	-	-
Soc. Sec.-Custodian	17900220	-	-	-
Insurance-Custodian	17900230	-	-	-
Workers Comp-Custodian	17900240	-	-	-
Disability Insurance	17900290	-	-	-
Bldg Insurance-Operations	17900320	15,000.00	9,000.00	9,000.00
Vehicle Insurance-Operations	17900321	-	-	-
Repair & Maint	17900350	1,000.00	1,000.00	1,000.00
Rental - Operations (or Mortgage Debt Service)	17900360	98,400.00	60,000.00	48,000.00
Telephone	17900370	3,000.00	3,000.00	3,000.00
Pagers	17900371	-	-	-
Water, Sewage and Garbage	17900380	1,200.00	960.00	480.00
Contracted Services-Operations	17900390	-	-	-
Contracted Services-Custodial	17900391	10,000.00	-	-
Contracted Services-Security	17900392	-	-	-
Contracted Services - Truck Maint.	17900393	-	-	-
Utilities	17900400	5,000.00	4,000.00	3,000.00
Gasoline	17900450	-	-	-
Supplies-Operations	17900510	4,200.00	3,360.00	2,520.00
Equipment -Operations	17900640	-	-	-
Motor Vehicles	17900650	-	-	-
Misc.Exp	17900790	-	-	-
<b>OPERATION OF PLANT</b>		<b>137,800.00</b>	<b>81,320.00</b>	<b>67,000.00</b>
Principal - Debt	19200710	-	-	-
Interest - Debt	19200720	-	-	-
<b>DEBT SERVICE</b>		<b>-</b>	<b>-</b>	<b>-</b>
<b>TOTAL OPERATING EXPENSES</b>		<b>586,558.80</b>	<b>354,666.40</b>	<b>266,302.70</b>
<b>CURRENT YEAR NET INCOME(LOSS)</b>		<b>32,001.20</b>	<b>30,610.60</b>	<b>2,661.30</b>
<b>ENDING FUND BALANCE 6/30</b>		<b>32,001.20</b>	<b>30,610.60</b>	<b>2,661.30</b>

Different facility required.

Staff will be responsible f

WEST ORANGE MONTESSORI CHARTER SCHOOL  
MONTHLY CASH FLOW PROJECTION - YEAR 1  
2011-2012

		July	August	September	October
	<u>ACCT NO.</u>	<u>2011</u>	<u>2011</u>	<u>2011</u>	<u>2011</u>
BEG. FUND BALANCE 7/01	12769000	-	-	-	-
<b>REVENUE/CASH INFLOWS</b>					
	<u>ACCT NO.</u>	<u>FTE</u>	<u>FTE</u>	<u>FTE</u>	<u>FTE</u>
		<u>90</u>	<u>90</u>	<u>90</u>	<u>90</u>
FEDERAL START-UP GRANT	43290000	160,394.71	45,694.71	33,410.58	-
FL EDUC FINANCE PROGRAM	13310000	32,786.17	32,786.17	32,786.17	32,786.17
FLORIDA LEAD TEACHER	13334000	-	-	-	-
INSTR MATERIALS	13336000	584.17	584.17	584.17	584.17
DISCRETIONARY LOTTERY	13344000	21.58	21.58	21.58	21.58
TRANSPORTATION - FEFP	13354000	1,125.00	1,125.00	1,125.00	1,125.00
TRANSPORTATION - OCSB	13354000	-	-	-	-
CLASS SIZE REDUCTION	13355000	10,635.75	10,635.75	10,635.75	10,635.75
SCHOOL RECOGNITION	13361000	-	-	-	-
EXCELLENT TEACHING PROGRAM	13363000	-	-	-	-
CAPITAL OUTLAY	13397000	-	-	-	-
SCHOOL TAXES	13411000	3,277.33	3,277.33	3,277.33	3,277.33
INTEREST	13430000	83.33	83.33	83.33	83.33
MISC REVENUE	13490000	2,083.33	2,083.33	2,083.33	2,083.33
LOAN PROCEEDS	13700000	-	-	-	-
<b>TOTAL REVENUE</b>		<b>210,991.38</b>	<b>96,291.38</b>	<b>84,007.25</b>	<b>50,596.67</b>
<b>TOTAL FUNDS AVAILABLE</b>		<b>210,991.38</b>	<b>96,291.38</b>	<b>84,007.25</b>	<b>50,596.67</b>
<b>OPERATING EXPENSES/CASH OUTFLOWS</b>					
<u>ACCOUNT NAME</u>	<u>ACCT NO.</u>				
Salaries-Teachers	15100120	19,583.33	19,583.33	19,583.33	19,583.33
Salaries-Paras	15100150	-	-	-	-
Retirement-Instructional	15100210	2,109.13	2,109.13	2,109.13	2,109.13
Soc Sec/Medicare-Instructional	15100220	1,498.13	1,498.13	1,498.13	1,498.13
Medical Insurance-Instructional	15100230	-	-	-	-
Workers Comp.-Instructional	15100240	146.88	146.88	146.88	146.88
Disability Insurance	15100290	-	-	-	-
Contracted Services-Instructional	15100310	-	-	-	-
Travel-Instructional	15100330	-	-	-	-
Repair & Maintenance	15100350	41.67	41.67	41.67	41.67
Other Purchased Services	15100390	-	-	-	-
Supplies-Instructional	15100510	4,500.00	-	-	-
Textbooks-Instructional	15100520	-	-	-	-
Equipment-Instructional	15100640	90,000.00	-	-	-
Software-Instructional	15100690	2,000.00	-	-	-
Dues & Fees-Instr	15100730	500.00	-	-	-
Salaries-Teachers-ESE	15500120	1,250.00	1,250.00	1,250.00	1,250.00
Retirement-Instructional-ESE	15500210	134.63	134.63	134.63	134.63
Soc Sec/Medicare-Instructional-ESE	15500220	95.63	95.63	95.63	95.63
Medical Insurance-Instructional-ESE	15500230	-	-	-	-
Workers Comp.-Instructional-ESE	15500240	9.38	9.38	9.38	9.38
Disability Insurance-ESE	15500290	-	-	-	-
Contracted Services-Instructional-ESE	15500310	41.67	41.67	41.67	41.67
<b>INSTRUCTIONAL</b>		<b>121,910.42</b>	<b>24,910.42</b>	<b>24,910.42</b>	<b>24,910.42</b>

**OPERATING EXPENSES/CASH OUTFLOWS**

<b>ACCOUNT NAME</b>	<b>ACCT NO.</b>				
Salaries-Media	16200130	-	-	-	-
Salaries-Media Paras	16200150	-	-	-	-
Retirement-Media	16200210	-	-	-	-
Social Security-Media	16200220	-	-	-	-
Medical Insurance-Media	16200230	-	-	-	-
Workers Comp-Media	16200240	-	-	-	-
Disability Insurance	16200290	-	-	-	-
Other Purchased Service	16200390	-	-	-	-
Supplies-Media	16200510	-	-	-	-
Periodicals	16200530	-	-	-	-
Library Books-Media	16200610	3,300.00	-	-	-
Audio-Visual-Media	16200620	600.00	-	-	-
Equipment-Media	16200640	-	-	-	-
Software - Media	16200690	1,000.00	-	-	-
<b>INSTRUCTIONAL MEDIA SVCS</b>		<b>4,900.00</b>	-	-	-
Contracted Services-Inservice	16400310	3,500.00	-	-	-
Travel - Instructional	16400330	500.00	-	-	-
Supplies	16400510	-	-	-	-
<b>INSTR STAFF TRNG SVCS</b>		<b>4,000.00</b>	-	-	-
Group Insurance	17100230	-	-	-	-
Unemployment Comp	17100250	-	-	-	-
Short Term Disability	17100290	-	-	-	-
Contracted Services-Admin/Gov/Audit	17100310	-	-	-	-
Contracted Services-Legal	17100311	-	-	-	-
Liability Insurance-Charter Board	17100320	650.00	650.00	650.00	650.00
Student Insurance-Charter Board	17100321	-	-	-	-
Travel-Charter Board	17100330	-	-	-	-
Postage Board	17100370	-	-	-	-
Other Services - Board	17100390	-	-	-	-
Supplies - Board	17100510	-	-	-	-
Dues & Fees-Board	17100730	200.00	-	-	-
<b>BOARD</b>		<b>850.00</b>	<b>650.00</b>	<b>650.00</b>	<b>650.00</b>
Salaries-Administration	17300110	6,250.00	6,250.00	6,250.00	6,250.00
Salaries-Admn. Para	17300150	-	-	-	-
Salaries-Admn. Sec.	17300160	1,666.67	1,666.67	1,666.67	1,666.67
Retirement-Admin	17300210	852.63	852.63	852.63	852.63
Soc. Sec./Medicare-Admin	17300220	605.63	605.63	605.63	605.63
Medical Insurance-Admin	17300230	-	-	-	-
Workers Comp-Admin	17300240	59.38	59.38	59.38	59.38
Disability Insurance	17300290	-	-	-	-
Travel-Admin	17300330	16.67	16.67	16.67	16.67
Repair & Maintenance	17300350	-	-	-	-
Postage	17300370	8.33	8.33	8.33	8.33
Other Purchased Svcs-Admin	17300390	-	-	-	-
Supplies-Admin	17300510	1,500.00	-	-	-
Equipment-Admin	17300640	3,000.00	-	-	-
Software-Admin	17300690	400.00	-	-	-
Dues & Fees-Admin	17300730	200.00	-	-	-
Salary- Sub Admin Sec	17300750	-	-	-	-
Misc Expense	17300790	-	-	-	-
OCPS Admin Cost	17300791	2,421.50	2,421.50	2,421.50	2,421.50
<b>SCHOOL ADM (OFFICE OF PRIN)</b>		<b>16,980.79</b>	<b>11,880.79</b>	<b>11,880.79</b>	<b>11,880.79</b>
Buildings - Down Payment	17400630	-	-	-	-
<b>FACILITIES ACQUISITION</b>		-	-	-	-
Contracted Services-Fiscal	17500310	500.00	500.00	500.00	500.00
Contracted Services-Payroll Processing	17500311	125.00	125.00	125.00	125.00
Contracted Services - Comerstone/FLEX	17500312	-	-	-	-
<b>FISCAL SERVICES</b>		<b>625.00</b>	<b>625.00</b>	<b>625.00</b>	<b>625.00</b>
Salaries-Transportation	17800160	-	900.00	900.00	900.00
Retirement-Transportation	17800210	-	96.93	96.93	96.93
Soc. Sec.-Transportation	17800220	-	68.85	68.85	68.85
Insurance-Transportation	17800230	-	-	-	-
Workers Comp-Transportation	17800240	-	6.75	6.75	6.75
Disability Insurance	17800290	-	-	-	-
Vehicle Insurance-Transportation	17800320	-	300.00	300.00	300.00
Student Insurance	17800321	-	36.00	36.00	36.00
Repair & Maint	17800350	-	250.00	250.00	250.00
Contracted Services-Transportation	17800390	-	60.00	60.00	60.00
Gasoline	17800450	-	350.00	350.00	350.00
<b>TRANSPORTATION</b>		-	<b>2,068.53</b>	<b>2,068.53</b>	<b>2,068.53</b>



**OPERATING EXPENSES/CASH OUTFLOWS**  
**ACCOUNT NAME**

**ACCT NO.**

Salaries-Custodial	17900160	-	-	-	-
Retirement-Custodian	17900210	-	-	-	-
Soc. Sec.-Custodian	17900220	-	-	-	-
Insurance-Custodian	17900230	-	-	-	-
Workers Comp-Custodian	17900240	-	-	-	-
Disability Insurance	17900290	-	-	-	-
Bldg Insurance-Operations	17900320	1,500.00	1,500.00	1,500.00	1,500.00
Vehicle Insurance-Operations	17900321	-	-	-	-
Repair & Maint	17900350	83.33	83.33	83.33	83.33
Rental - Operations (or Mortgage Debt Service)	17900360	8,200.00	8,200.00	8,200.00	8,200.00
Telephone	17900370	250.00	250.00	250.00	250.00
Pagers	17900371	-	-	-	-
Water, Sewage and Garbage	17900380	100.00	100.00	100.00	100.00
Contracted Services-Operations	17900390	-	-	-	-
Contracted Services-Custodial	17900391	833.33	833.33	833.33	833.33
Contracted Services-Security	17900392	-	-	-	-
Contracted Services - Truck Maint.	17900393	-	-	-	-
Utilities	17900400	416.67	416.67	416.67	416.67
Gasoline	17900450	-	-	-	-
Supplies-Operations	17900510	4,200.00	-	-	-
Equipment -Operations	17900640	-	-	-	-
Motor Vehicles	17900650	-	-	-	-
Misc Exp	17900790	-	-	-	-
<b>OPERATION OF PLANT</b>		<b>15,583.33</b>	<b>11,383.33</b>	<b>11,383.33</b>	<b>11,383.33</b>
Principal - Debt	19200710	-	-	-	-
Interest - Debt	19200720	-	-	-	-

November 2011	December 2011	January 2012	February 2012	March 2012 (921.40)	April 2012 (442.81)	May 2012 (1,384.22)	June 2012 (135.82)
<u>FTE</u> <u>90</u>	<u>FTE</u> <u>90</u>	<u>FTE</u> <u>90</u>	<u>FTE</u> <u>90</u>	<u>FTE</u> <u>90</u>	<u>FTE</u> <u>90</u>	<u>FTE</u> <u>90</u>	<u>FTE</u> <u>90</u>
32,786.17	32,786.17	32,786.17	32,786.17	32,786.17	32,786.17	32,786.17	32,786.17
584.17	584.17	584.17	584.17	584.17	584.17	584.17	584.17
21.58	21.58	21.58	21.58	21.58	21.58	21.58	21.58
1,125.00	1,125.00	1,125.00	1,125.00	1,125.00	1,125.00	1,125.00	1,125.00
10,635.75	10,635.75	10,635.75	10,635.75	10,635.75	10,635.75	10,635.75	10,635.75
3,277.33	3,277.33	3,277.33	3,277.33	3,277.33	3,277.33	3,277.33	3,277.33
83.33	83.33	83.33	83.33	83.33	83.33	83.33	83.33
2,083.33	2,083.33	2,083.33	2,083.33	2,083.33	2,083.33	2,083.33	2,083.33
<u>50,598.67</u>	<u>50,598.67</u>	<u>50,598.67</u>	<u>50,598.67</u>	<u>51,998.67</u>	<u>50,598.67</u>	<u>50,598.67</u>	<u>61,098.67</u>
<u>50,598.67</u>	<u>50,598.67</u>	<u>50,598.67</u>	<u>50,598.67</u>	<u>51,075.26</u>	<u>50,163.86</u>	<u>49,232.45</u>	<u>60,961.05</u>
19,583.33	19,583.33	19,583.33	19,583.33	19,583.33	19,583.33	19,583.33	19,583.33
2,109.13	2,109.13	2,109.13	2,109.13	2,109.13	2,109.13	2,109.13	2,109.13
1,498.13	1,498.13	1,498.13	1,498.13	1,498.13	1,498.13	1,498.13	1,498.13
146.88	146.88	146.88	146.88	146.88	146.88	146.88	146.88
41.67	41.67	41.67	41.67	41.67	41.67	41.67	41.67
1,250.00	1,250.00	1,250.00	1,250.00	1,250.00	1,250.00	1,250.00	1,250.00
134.63	134.63	134.63	134.63	134.63	134.63	134.63	134.63
95.63	95.63	95.63	95.63	95.63	95.63	95.63	95.63
9.38	9.38	9.38	9.38	9.38	9.38	9.38	9.38
41.67	41.67	41.67	41.67	41.67	41.67	41.67	41.67
<u>24,910.42</u>	<u>24,910.42</u>	<u>24,910.42</u>	<u>24,910.42</u>	<u>24,910.42</u>	<u>24,910.42</u>	<u>24,910.42</u>	<u>24,910.42</u>



-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-
1,500.00	1,500.00	1,500.00	1,500.00	1,500.00	1,500.00	-	-
83.33	83.33	83.33	83.33	83.33	83.33	83.33	83.33
8,200.00	8,200.00	8,200.00	8,200.00	8,200.00	8,200.00	8,200.00	8,200.00
250.00	250.00	250.00	250.00	250.00	250.00	250.00	250.00
-	-	-	-	-	-	-	-
100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00
-	-	-	-	-	-	-	-
833.33	833.33	833.33	833.33	833.33	833.33	833.33	833.33
-	-	-	-	-	-	-	-
416.67	416.67	416.67	416.67	416.67	416.67	416.67	416.67
-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-
<u>11,383.33</u>	<u>11,383.33</u>	<u>11,383.33</u>	<u>11,383.33</u>	<u>11,383.33</u>	<u>11,383.33</u>	<u>9,883.33</u>	<u>9,883.33</u>
-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-
-	-	-	51,518.07	51,518.07	51,518.07	49,368.07	57,799.54
-	-	-	(921.40)	478.90	(921.40)	1,228.90	3,297.12
-	-	-	(921.40)	(442.81)	(1,364.22)	(135.62)	3,161.51

**WEST ORANGE MONTESSORI CHARTER SCHOOL  
KINDERGARTEN BREAKOUT  
2011-2012**

Revenue Increase 102.00%  
Salary Increase 102.00%  
Inflation 102.00%

BEG . FUND BALANCE 7/01	<u>ACCT NO.</u>	<u>2011-2012</u>
	12769000	-
<b>1 Classroom</b>		
	<u>FTE</u>	
	<u>18</u>	
<b>REVENUE</b>	<b>ACCT NO.</b>	
FEDERAL START-UP GRANT	43290000	-
FL EDUC FINANCE PROGRAM	13310000	74,976.20
FLORIDA LEAD TEACHER	13334000	200.00
INSTR MATERIALS	13336000	1,402.00
DISCRETIONARY LOTTERY	13344000	51.80
TRANSPORTATION - FEFP	13354000	2,700.00
TRANSPORTATION - OCSB	13354000	-
CLASS SIZE REDUCTION	13355000	25,525.80
SCHOOL RECOGNITION	13361000	-
STATE STABILIZATION	13363000	-
CAPITAL OUTLAY	13397000	-
SCHOOL TAXES	13411000	7,865.60
INTEREST	13430000	-
MISC REVENUE/FUNDRAISING	13490000	-
LOAN PROCEEDS	13700000	-
<b>TOTAL REVENUE</b>		<u><b>112,721.40</b></u>
<b>TOTAL FUNDS AVAILABLE</b>		<u><b>112,721.40</b></u>

<u>OPERATING EXPENSES</u>	<u>ACCT NO.</u>		
<u>ACCOUNT NAME</u>			
Salaries-Teachers	15100120	37,000.00	
Salaries-Paras	15100150	-	
Retirement-Instructional	15100210	-	
Soc Sec/Medicare-Instructional	15100220	2,830.50	
Medical Insurance-Instructional	15100230	-	
Workers Comp.-Instructional	15100240	277.50	
Disability Insurance	15100290	-	
Contracted Services-Instructional	15100310	-	
Travel-Instructional	15100330	-	
Repair & Maintenance	15100350	-	
Other Purchased Services	15100390	-	
Supplies-Instructional	15100510	900.00	\$50 per student.
Textbooks-Instructional	15100520	-	
Equipment-Instructional	15100640	-	
Software-Instructional	15100690	-	
Dues & Fees-Instr	15100730	-	
Salaries-Teachers-ESE	15500120	-	
Retirement-Instructional-ESE	15500210	-	
Soc Sec/Medicare-Instructional-ESE	15500220	-	
Medical Insurance-Instructional-ESE	15500230	-	
Workers Comp.-Instructional-ESE	15500240	-	
Disability Insurance-ESE	15500290	-	
Contracted Services-Instructional-ESE	15500310	-	
<b>INSTRUCTIONAL</b>		<u><b>41,008.00</b></u>	

**OPERATING EXPENSES**

<b>ACCOUNT NAME</b>	<b>ACCT NO.</b>		
Salaries-Clinic	16200130	-	
Retirement-Media	16200210	-	
Social Security-Media	16200220	-	
Medical Insurance-Media	16200230	-	
Workers Comp-Media	16200240	-	
Disability Insurance	16200290	-	
Supplies-Clinic	16200510	-	
Equipment-Clinic	16200540	-	
<b>PUPIL PERSONNEL SERVICES</b>		<hr/>	-
Salaries-Media	16200130	-	
Salaries-Media Paras	16200150	-	
Retirement-Media	16200210	-	
Social Security-Media	16200220	-	
Medical Insurance-Media	16200230	-	
Workers Comp-Media	16200240	-	
Disability Insurance	16200290	-	
Other Purchased Service	16200390	-	
Supplies-Media	16200510	-	
Periodicals	16200530	-	
Library Books-Media	16200610	-	
Audio-Visual-Media	16200620	-	
Equipment-Media	16200640	-	
Software - Media	16200690	-	
<b>INSTRUCTIONAL MEDIA SVCS</b>		<hr/>	-
Contracted Services-Inservice	16400310	-	
Travel - Instructional	16400330	-	
Supplies	16400510	-	
<b>INSTR STAFF TRNG SVCS</b>		<hr/>	-
Group Insurance	17100230	-	
Unemployment Comp	17100250	-	
Short Term Disability	17100290	-	
Contracted Services-Admin/Gov/Audit	17100310	-	
Contracted Services-Legal	17100311	-	
Liability Insurance-Charter Board	17100320	-	
Student Insurance-Charter Board	17100321	-	
Travel-Charter Board	17100330	-	
Postage Board	17100370	-	
Other Services - Board	17100390	-	
Supplies - Board	17100510	-	
Dues & Fees-Board	17100730	-	
<b>BOARD</b>		<hr/>	-
Salaries-Administration	17300110	-	
Salaries-Admn. Para	17300150	-	
Salaries-Admn. Sec.	17300160	-	
Retirement-Admin	17300210	-	
Soc. Sec./Medicare-Admin	17300220	-	
Medical Insurance-Admin	17300230	-	
Workers Comp-Admin	17300240	-	
Disability Insurance	17300290	-	
Travel-Admin	17300330	-	
Repair & Maintenance	17300350	-	
Postage	17300370	-	
Other Purchased Svcs-Admin	17300390	-	
Supplies-Admin	17300510	-	
Equipment-Admin	17300640	-	
Software-Admin	17300690	-	
Dues & Fees-Admin	17300730	-	
Salary- Sub Admin Sec	17300750	-	
Misc Expense	17300790	-	
OCPS Admin Cost	17300791	5,626.07	
<b>SCHOOL ADM (OFFICE OF PRIN)</b>		<hr/>	5,626.07
Buildings - Down Payment/Loan Costs	17400630	-	
<b>FACILITIES ACQUISITION</b>		<hr/>	-
Contracted Services-Fiscal	17500310	-	
Contracted Services-Payroll Processing	17500311	-	
Contracted Services - Cornerstone/FLEX	17500312	-	
<b>FISCAL SERVICES</b>		<hr/>	-
Salaries-Transportation	17800160	1,800.00	
Retirement-Transportation	17800210	193.86	

**OPERATING EXPENSES**

<b>ACCOUNT NAME</b>	<b>ACCT NO.</b>		
Soc. Sec.-Transportation	17800220	137.70	
Insurance-Transportation	17800230	-	
Workers Comp-Transportation	17800240	13.50	
Disability Insurance	17800290	-	
Vehicle Insurance-Transportation	17800320	600.00	
Student Insurance	17800321	72.00	
Repair & Maint	17800350	500.00	
Contracted Services-Transportation	17800390	120.00	
Gasoline	17800450	700.00	
<b>TRANSPORTATION</b>		<u>4,137.06</u>	
Salaries-Custodial	17900160	-	
Retirement-Custodian	17900210	-	
Soc. Sec.-Custodian	17900220	-	
Insurance-Custodian	17900230	-	
Workers Comp-Custodian	17900240	-	
Disability Insurance	17900290	-	
Bldg Insurance-Operations	17900320	-	One-half of private facility cost: 18 of 36 students age 3-6 in KDG.
Vehicle Insurance-Operations	17900321	-	
Repair & Maint	17900350	-	
Rental - Operations (or Mortgage Debt Service)	17900360	20,400.00	One-half of private facility cost: 18 of 36 students age 3-6 in KDG.
Telephone	17900370	-	One-half of private facility cost: 18 of 36 students age 3-6 in KDG.
Pagers	17900371	-	
Water, Sewage and Garbage	17900380	-	One-half of private facility cost: 18 of 36 students age 3-6 in KDG.
Contracted Services-Operations	17900390	-	
Contracted Services-Custodial	17900391	-	
Contracted Services-Security	17900392	-	
Contracted Services - Truck Maint.	17900393	-	
Utilities	17900400	-	One-half of private facility cost: 18 of 36 students age 3-6 in KDG.
Gasoline	17900450	-	
Supplies-Operations	17900510	-	One-half of private facility cost: 18 of 36 students age 3-6 in KDG.
Equipment -Operations	17900640	-	
Motor Vehicles	17900650	-	
Misc Exp	17900790	-	
<b>OPERATION OF PLANT</b>		<u>20,400.00</u>	
Principal - Debt	19200710	-	
Interest - Debt	19200720	-	
<b>DEBT SERVICE</b>		<u>-</u>	
<b>TOTAL OPERATING EXPENSES</b>		<u>71,171.13</u>	
<b>CURRENT YEAR NET INCOME(LOSS)</b>		<u>41,550.27</u>	
<b>ENDING FUND BALANCE 6/30</b>		<u>41,550.27</u>	

WEST ORANGE MONTESSORI CHARTER SCHOOL  
ASSUMPTIONS IN DEVELOPING THE BUDGET  
2011-2012

**Revenue:**

Revenue is based upon the Florida School FEFP Calculation Worksheet created by the Florida Department of Education.

The state allocation per student is assumed to increase 2% per year.

Florida Lead Teacher funding is assumed to be \$200 per teacher per year.

Capital outlay funding is available starting in Year 4 at a rate of \$5,000 per month.

**Expenses:**

Staff salaries increase at a rate of 2% per year.

Inflation is assumed to be 2% per year.

Construction on a second building on school property is expected to commence in Year 3 and be completed in Year 4.

The existing building will be rented for two years and be purchased in Year 3.



## Revenue Estimate Worksheet for WOCMS Charter School

Based on the Third Calculation of the FEFP 2009-10

School District: **Orange**

1. **2009-10 FEFP State and Local Funding**  
Base Student Allocation **\$3,630.62**

District Cost Differential: **1.00**

Program	Number of FTE	Program Cost Factor	Weighted FTE (b) x (c)
(a)	(b)	(c)	(d)
101 Basic K-3	84.00	1.074	90.2160
111 Basic K-3 with ESE Services	6.00	1.074	6.4440
102 Basic 4-8		1.000	0.0000
112 Basic 4-8 with ESE Services		1.000	0.0000
103 Basic 9-12		1.033	0.0000
113 Basic 9-12 with ESE Services		1.033	0.0000
254 ESE Level 4 (Grade Level PK-3)		3.520	0.0000
ESE Level 4 (Grade Level 4-8)		3.520	0.0000
ESE Level 4 (Grade Level 9-12)		3.520	0.0000
255 ESE Level 5 (Grade Level PK-3)		4.854	0.0000
ESE Level 5 (Grade Level 4-8)		4.854	0.0000
ESE Level 5 (Grade Level 9-12)		4.854	0.0000
130 ESOL (Grade Level PK-3)		1.124	0.0000
ESOL (Grade Level 4-8)		1.124	0.0000
ESOL (Grade Level 9-12)		1.124	0.0000
300 Career Education (Grades 9-12)		1.050	0.0000
<b>Totals</b>	<b>90.00</b>		<b>96.6600</b>

ESE Guaranteed Allocation:	FTE	Grade Level	Matrix Level	Guarantee Per Student
Additional Funding from the ESE Guaranteed Allocation.	2.00	PK-3	251	\$ 1,015
Enter the FTE from 111, 112, & 113 by grade and matrix level. Students who do not have a matrix level should be considered 251. This total should equal all FTE from programs 111, 112 & 113 above.	3.00	PK-3	252	\$ 3,278
	1.00	PK-3	253	\$ 6,689
		4-8	251	\$ 1,138
		4-8	252	\$ 3,401
		4-8	253	\$ 6,812
		9-12	251	\$ 810
		9-12	252	\$ 3,073
		9-12	253	\$ 6,483
<b>Total FTE with ESE Services</b>	<b>6.00</b>			<b>Total from ESE Guarantee</b>

3. <b>Supplemental Academic Instruction:</b>			
District SAI Allocation	\$ 37,651,463		
divided by district FTE (with eligible services)		169,847.61	Per Student \$ 221.68

4. **Reading Allocation:**  
 Charter Schools should contact their school district sponsor regarding eligibility and distribution of reading allocation funds.

**Total Base Funding, ESE Guarantee, and SAI**

Class size Reduction Funds:	Weighted FTE aggregated from input in Section 1	DCD	Allocation factors*
PK - 3	96.6600	X 1.0094	X 1308.10 = 127,629
4-8	0.0000	X 1.0094	X 892.26 = 0

9-12

0.0000 X 1.0094 X  
Total 90.0000 \*

894.41 = 0  
Total Class Size Reduction Funds

(\*Total FTE should equal total in Section I, column (d).)

6A. Divide school's Weighted FTE (WFTE) total computed in (d) above: <u>96.6600</u> by district's WFTE: <u>185,668.90</u> to obtain school's WFTE share.				0.0521%
6B. Divide school's Unweighted FTE (UFTE) total computed in (b) above: <u>90.00</u> by district's UFTE: <u>169,847.61</u> to obtain school's UFTE share.				0.0530%
6C. Divide school's High School Unweighted FTE (UFTE) total computed in (b) above: <u>0.00</u> by district's UFTE: <u>169,847.61</u> to obtain school's UFTE share.				0.0000%
	Refer to Note:			
7. Other FEFP (WFTE share) Applicable to all Charter Schools:	(a)	<u>5,117,078</u>	x	0.0521%
Declining Enrollment	265,402			
Sparsity Supplement	0			
Minimum Guarantee	0			
Program Related Requirements:				
Safe Schools	4,851,676			
Lab School Discretionary	0			
8. Discretionary Local Effort (WFTE share)	(d)	<u>72,407,192</u>	x	0.0521%
9. Discretionary Millage Compression Allocation				
.748 mills (UFTE share)	(b)	<u>3,026,684</u>	x	0.0530%
.250 mills (UFTE share)	(b)	<u>0</u>	x	0.0530%
10. State Fiscal Stabilization Fund Entitlement (WFTE share)	(a)	<u>60,526,904</u>	x	0.0521%

Charter schools should contact their school district sponsor regarding whether the entitlement is from State Fiscal Stabilization Funds or the General Fund. See footnote h below.

11. Proration to Funds Available (WFTE share)	(a)	<u>(3,782,458)</u>	x	0.0521%
12. Discretionary Lottery (WFTE share)	(a)	<u>496,758</u>	x	0.0521%
13. Instructional Materials Allocation (UFTE share)	(b)	<u>13,226,006</u>	x	0.0530%
Science Laboratory Materials (high school only)	(c)	<u>208,462</u>	x	0.0000%
Dual Enrollment Instructional Materials Allocation (See footnote i below)				
14. Student Transportation	(e)			
15. Florida Teachers Lead Program Stipend	(f)			
16. Food Service Allocation	(g)			
17. Performance Pay Plan				

NOTES:

- (a) District allocations multiplied by percentage from item 6A. Total
- (b) District allocations multiplied by percentage from item 6B.
- (c) District allocations multiplied by percentage from item 6C.
- (d) Proceeds of millage levy multiplied by percentage from item 6A.
- (e) Consistent with Chapter 1006.21, Florida Statutes and DOE Student Transportation General Instructions
- (f) Teacher Lead Program Allocation per 1012.71, Florida Statutes
- (g) Funding based on student eligibility and meals provided, if participating in the National School Lunch Program.
- (h) If the district's decision is to use the State Fiscal Stabilization Funds, then the charter school will have to comply with the district's requirements for assurances and reporting.
- (i) As provided in the 2008 General Appropriations Act, school districts are required to pay for instructional materials used for the instruction of public school hi students who are earning credit toward high school graduation under the dual enrollment program as provided in section 1011.62(1)(i), Florida Statutes. *Administrative fees charged by the school district shall be calculated based upon 5 percent of available funds from the FEFP and categorical funding for which charter students may be eligible. For charter schools with a population of 501 or more students the difference in the fee calculation and the fee withheld may only be used for capital outlay purposes specified in 1013.62(2) F.S. To calculate the administrative fee to be withheld for schools with more than 500 students, divide the school population into 500. Multiply that fraction times the funds available, then times 5%.*

094

**2008-09**  
**Base Funding**  
**WFTE x**  
**BSA x DCD**  
**(e)**

\$	330,619
\$	23,616
\$	-
\$	-
\$	-
\$	-
\$	-
\$	-
\$	-
\$	-
\$	-
\$	-
\$	-
\$	-
\$	-
\$	-
\$	-
\$	354,235

\$	2,030
\$	9,834
\$	6,689
\$	-
\$	-
\$	-
\$	-
\$	-
\$	-
\$	-
\$	18,553

\$	19,951
----	--------

\$	392,739
----	---------

\$ 127,629

\$ 2,666

\$ 37,724

\$ 1,604

\$ -

\$ 31,535

-\$ 1,971

\$ 259

\$ 7,010

\$ -

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\$ 599,195

igh school  
s.

# CERTIFICATE OF PARTICIPATION

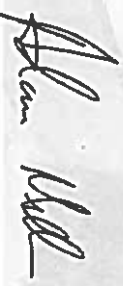
*is presented to:*

Michelle Dulany

*for completion of:*

## NEW APPLICANT TRAINING

Conducted on this 8<sup>th</sup> day of June, 2010.



DIRECTOR, CHARTER SCHOOLS





EXECUTIVE DIRECTOR, SCHOOL CHOICE



# CERTIFICATE OF PARTICIPATION

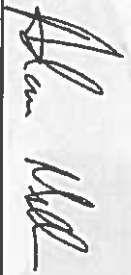
is presented to:

Anya Kaleshefski

for completion of:

## NEW APPLICANT TRAINING

Conducted on this 8<sup>th</sup> day of June, 2010.



DIRECTOR, CHARTER SCHOOLS





EXECUTIVE DIRECTOR, SCHOOL CHOICE

