

Lee Montessori Charter School
Application
March 1, 2013

APPLICANT INFORMATION SHEET

Request for Approval

This application is a request to establish and operate a Public Charter School as provided in the District of Columbia School Reform Act of 1995, as amended.

Name of Proposed Charter School: Lee Montessori Public Charter School

Name of Entity Applying for Charter Status in DC: Lee Montessori PCS

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Name of Person Authorized to Negotiate:

(Must be member of local founding group and not serving as a consultant or affiliated with an educational service provider.)

Authorized Signature: 

Proposed Start Date: Fall 2014

Proposed Year 1 Budget: \$1,503,839

Start Up Information

First-Year Enrollment: From age/grade: to age/grade: Number of students:

PS 1

70

Year Five Enrollment: From age/grade: to age/grade: Number of students:

PS 5

198

Enrollment at Capacity: From age/grade: to age/grade: Number of students:

PS 6

228

Location of school (address or area of city): TBD

Names of Organizations Involved in Planning (if applicable):

Name of Educational Service Provider (if applicable):

Type of Application (Check One)

Conversion of Existing Public School

Conversion of Existing Private School

New School

If conversion, name the school being converted: _____

If conversion, do you wish to retain the existing school site? Yes No

LEA Status: Will the school elect to be treated as a Local Education Agency (LEA) for purposes of Part B of the IDEA and Section 504 of the Rehabilitation Act of 1973? Yes No

EXECUTIVE SUMMARY

The mission of Lee Montessori PCS is to create a peaceful, multi-age learning environment for preschool and elementary aged children that fosters the physical, social, emotional and academic growth and development of students and produces life-long learners using the materials and philosophy developed by Maria Montessori and furthered by the Association Montessori Internationale (AMI).

Given that Montessori was originally developed to serve at-risk students and the success of other Montessori programs in DC and other cities, the Founding Board of Lee Montessori PCS is confident that this curriculum will successfully lay a foundation for our target student population to be college and career ready. The children with whom Maria Montessori began her world-renowned method and research over a century ago were the most at-risk children in the lowest socio-economic neighborhoods in Italy. We believe at-risk children are the population that can most benefit from this individualized, constructivist-based curriculum and that our school will reach many of these children in our target population. A Montessori classroom is inherently an inclusive environment and will promote itself as the least restrictive environment for special needs students. In addition, the model of mixed-age classrooms and 3-year learning cycles facilitates children learning at their own pace. Families will be able to provide their children with a comprehensive Montessori education starting at 3 years of age and continuing through the elementary years, a trend that is rarely found in a public or private setting.

We will serve children ages 3-12 years in Montessori primary and elementary classes. At capacity we will enroll approximately 200 children and hope to be permanently located in either Ward 5 or Ward 7. We will offer an extended school day, with hours from 9am-4pm with 186 academic days in the 2014-2015 school calendar. In addition students will have the opportunity to participate in a wide range of extracurricular activities during before and after care offerings.

Two current public Montessori teachers in Washington DC developed the idea for Lee Montessori PCS with the assistance of current parents of Montessori students in DC public schools. Recognizing that their expertise was primarily in AMI curriculum and accreditation standards, the initial founding members reached out to members of the community with strong leadership skills in the areas of education law, business development, board governance, fundraising, educational administration, and community activism to expand the founding group. In addition to their varied skills, many of the founding group members have a personal connection and dedication to the Montessori movement. Upon the granting of a charter, Lee Montessori PCS will be governed by an active and diverse Board of Trustees with a dedication to student achievement and upholding the mission and philosophies laid out in the charter.

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A. EDUCATIONAL PLAN

1. MISSION AND PURPOSE OF THE PROPOSED PUBLIC CHARTER SCHOOL

A. MISSION AND PHILOSOPHY

Mission

The mission of Lee Montessori PCS is to create a peaceful, multi-age learning environment for preschool and elementary aged children that fosters the physical, social, emotional and academic growth and development of students and produces life-long learners using the materials and philosophy developed by Maria Montessori and furthered by the Association Montessori Internationale (AMI).

Philosophy

Given that Montessori was originally developed to serve at-risk students and the success of other Montessori programs in DC and other cities, the Founding Board of Lee Montessori PCS is confident that this curriculum will successfully lay a foundation for our target student population to be college and career ready. The children with whom Maria Montessori began her world-renowned method and research over a century ago were the most at-risk children in the lowest socio-economic neighborhoods in Italy. We believe at-risk children are the population that can most benefit from this individualized, constructivist-based curriculum and that our school will reach many of these children in our target population. A Montessori classroom is inherently an inclusive environment and will promote itself as the least restrictive environment for special needs students. In addition, the model of mixed-age classrooms and 3-year learning cycles facilitates children learning at their own pace. Families will be able to provide their children with a comprehensive Montessori education starting at 3 years of age and continuing through the elementary years, a trend that is rarely found in a public or private setting.

B. EDUCATIONAL NEEDS OF THE TARGET STUDENT POPULATION

In the initial years of operation, Lee Montessori PCS will serve children ages 3-9 in traditional Montessori multi-age classrooms. Pre-school, pre-K, and kindergarten are considered Montessori primary and includes ages 3-6. Montessori lower elementary (1st, 2nd and 3rd grades) encompasses ages 6-9. Lee Montessori plans to locate in either Ward 5 or Ward 7 but will be open to children from all parts of the city. Consequently, it is difficult to predict exactly the nature or composition of our student body. However, based on data from DCPS, existing charter school enrollments, and the demographics of these Wards, we can anticipate that 70-80% of the target student population will qualify for free or reduced price lunch, 5-10% will be identified as students with special needs, and as many as 10% will be English Language Learners.¹

Research shows that poverty is a significant factor associated with poor educational outcomes. A 2012 study from The Brookings Institution examines the effect of poverty on “school readiness” in

¹ These figures come from the Office of the State Superintendent of Schools (OSSE) and the DCPCSB 2012 School Performance Report.

² Julia B. Isaacs, “Starting School at a Disadvantage: The School Readiness of Poor Children” Center on Children and

children.² School readiness was defined as having pre-academic skills, such as recognizing letters and numbers; the ability to sit still, pay attention and follow directions; and lack of behavioral or health problems. The study found that only 48% of poor children are ready for school at age five compared with 75% of children from moderate to high-income households. It also showed that living with a single mother contributes to the poverty gap in school readiness, particularly in behavioral outcomes. The study concludes that preschool programs offer the most promise for increasing the school readiness of poor children. With the latest figures showing that, in Wards 5 and 7, unemployment is significantly higher than the rest of the city, the majority of families are headed by single mothers, and 28% of children live in poverty³ (Table 1), we are confident that we will serve the high needs population on which a Montessori education is demonstrated to have a positive impact.

Table 1. Target Ward profiles

	DC	Ward 5	Ward 7
Poverty rate in Children	30%	28%	40%
Unemployment Rate	9%	14%	19%
Median Family Income	\$49,594	\$45,184	\$31,797
Families headed by a single woman	50%	56%	69%

The Montessori curriculum has been countering the negative effects of poverty for over 100 years. Many of the interventions used to support children who are not achieving performance standards in literacy including enriching vocabulary, phonemic and phonologic awareness, and integrative language learning are natural components of the Montessori method.⁴ One of the most oft-quoted research studies, published by Angeline Lillard and Nicole Else-Quest in 2006, found that students in AML-recognized public inner city schools outperformed their non-Montessori peers in standardized tests of reading and math at the kindergarten level. At the end of sixth grade, the Montessori students wrote essays with more complex sentence structure and creativity. Both Montessori age groups studied demonstrated more advanced levels of social cognition and executive control and higher levels of positive responses to social dilemmas than their non-Montessori peers.⁵

The most recent data regarding literacy among D.C. school children shows a dismal picture. Eighty-one percent of 4th graders are reading below a proficient level and 56% cannot read at even a basic level.⁶ For students eligible for free/reduced school lunch, the percentage reading below proficient rises to 90% as opposed to 55% of non-eligible 4th graders. It is critical that our target student population has access to quality literacy programs to ensure that they have a solid foundation for school success. Lee Montessori PCS will meet this need with the proven Montessori curriculum that emphasizes beginning literacy skills and often has children reading by age 4 (discussed in-depth in the Educational Focus and Student Learning Standards sections). Furthermore, an examination of the literacy data from the Latin American Bilingual Montessori School (LAMB) PCS and the DCPS school Capitol Hill Montessori at Logan demonstrates the effectiveness of the Montessori curriculum in literacy education. In 2012, LAMB had 70% of its students testing Proficient or

² Julia B. Isaacs, "Starting School at a Disadvantage: The School Readiness of Poor Children" Center on Children and Families at Brookings.
http://www.brookings.edu/~media/research/files/papers/2012/3/19%20school%20disadvantage%20isaacs/0319_school_disadvantage_isaacs.pdf

³ U. S. Dept. of Health and Human Services, aspe.hhs.gov/poverty/12fedreg/shtml

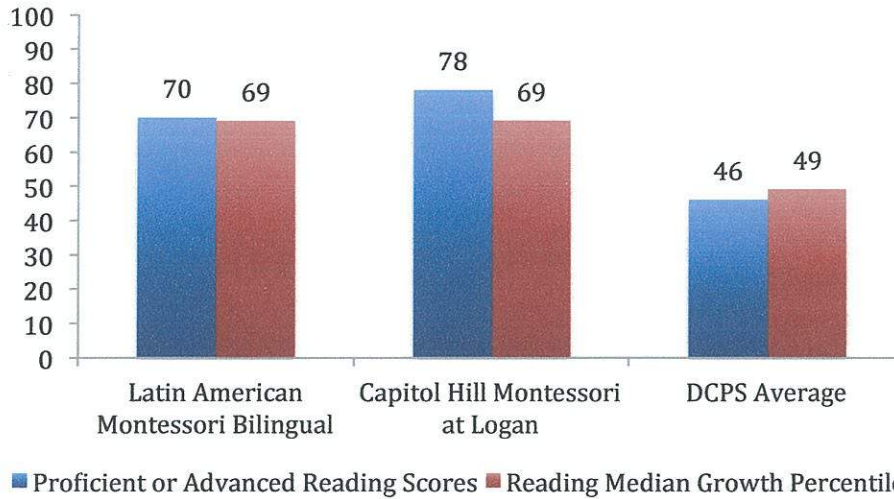
⁴ The Shaker Institute, *Preschool Curriculum: What's in it for Children and Teachers?*, 2009

⁵ Lillard, Angeline and Nicole Else-Quest. 2006. "The Early Years: Evaluating Montessori Education. *Science* 313:S79S, pp. 1893-1894

⁶ Datacenter.kidscount.org

Advanced in Reading with a Reading Median Growth Percentile of 69%. Capitol Hill Montessori had 78% testing Proficient or Advanced in Reading with a 69% growth percentile. Both schools significantly outscored the District of Columbia Public Schools’ average of 46% Proficient or Advanced in Reading and a range of 17-79% growth percentile, as shown in the graph below. Like these schools, Lee Montessori PCS will employ a traditional Montessori education for all its students in grades PS-6.

Table 2. Reading scores on the DC-CAS (in percentage)⁷



In its first year of operation, Lee Montessori PCS plans to serve 70 students in four mixed age classrooms. There will be three classes designated as primary (ages 3-6) and one lower elementary class (ages 6-9). We project by year 5 to have an enrollment of approximately 200 students consisting of 3 primary classes, 2 lower elementary classes, and 2 upper elementary classes (ages 9-12). See the projected enrollment by grade level below.

Table 3. Lee Montessori PCS Enrollment Projections

Multiage Classrooms	2014	2015	2016	2017	2018
Primary (Ages 3-6)					
PS	30	30	30	30	30
PK	15	30	30	30	30
K	15	15	30	30	30
Lower Elementary (Ages 6-9)					
1st	10	18	20	30	30
2nd		10	18	20	30
3rd			10	18	20
Upper Elementary (Ages 9-12)					
4th				10	18
5th					10
ELL Students	3	5	6	7	8
Special Ed Students	4	6	10	14	18
Total	70	103	138	168	198

⁷ Friends of Choice in Urban Schools, School Quality Dashboard

School's Impact on the Surrounding Community

The need for these quality, performing education seats in Wards 5 and 7 is clearly demonstrated in the 2012 IFF report "Quality Schools: Every Child, Every School, Every Neighborhood." This report examines the supply of top performing education seats in the District of Columbia, the demand for these seats, and the resulting service gap when demand exceeds supply. The report identifies the Top Ten Priority Neighborhood Clusters, i.e. clusters that have the fewest performing seats. Four of these clusters are located in Wards 5 and 7. Even more telling is the service gap analysis for K-5, a target student population for Lee Montessori PCS. Of the 15 clusters with the highest gap in service (i.e. the lowest percentage of students grades K-5 in top performing seats) 7 are located in Wards 5 and 7.

A significant portion of the Lee Montessori target student population will be preschool and pre-K, a school demographic not addressed in the above report. The Office of the Mayor recently released the first annual report from Raise DC, a newly formed public-private partnership aimed at improving the lives of D.C.'s neediest young people. This report indicates that, while there are numerous early childhood programs in the District, there are no standard evaluation tools to determine whether these youngest children are entering kindergarten having met academic and developmental benchmarks necessary for success. There is also currently no standardized way of comparing the quality of early childhood education across the District's publicly-funded programs. It is significant therefore that, in developing a plan to turnaround its struggling early childhood programming, DCPS sought recognition by AMI its preschool and pre-K programs.

Data from the Office of the State Superintendent of Education shows that enrollment in preschool and pre-K classes in both DCPS and public charter schools steadily increased from 2001 to 2010.⁸ In addition, there is high demand for Montessori programs in the District. Capitol Hill Montessori (211 students) had 500 new family applicants for the 2012-2013 school year. LAMB (262 students) consistently has more applicants than there are slots available. In the 2011-2012 school year there were 585 applicants on the wait list after all the available slots had been filled.

The Montessori program at Thurgood Marshall Elementary School in Ward 5 has three primary classes and one elementary class that are popular and have consistently attracted out-of-boundary students. Thurgood Marshall will close at the end of the current school year leaving no Montessori program – DCPS or charter school – in Ward 5. There are two DCPS Montessori programs in Ward 7, but they offer a limited number of seats, and only one has a program beyond primary.

Lee Montessori PCS can have a significant impact on the service gap described above by creating new opportunities for top performing education seats. Our school will help meet the demand for Montessori programs in Wards 5 and 7, and will also attract families throughout the District who are struggling to provide a quality Montessori education for their children.

C. EDUCATIONAL FOCUS

Educational Focus

In 1907, Italian scientist Maria Montessori began to develop a radical new approach to education based on her observations of young children. Now practiced in classrooms around the world, this philosophy of education is based on the premises of independence, freedom within limitations, and following the natural psychological development of the child. Much of the modern research in

⁸ Every Kid Counts, 17th Annual Factbook

psychology and brain development now confirms that the Montessori method is much more suitable to how children learn than traditional, teacher-driven instruction classrooms that many of us are familiar with. In her book, *Montessori: The Science Behind the Genius*, Angeline Stoll Lillard discusses eight principles of Montessori Education.

Those eight principles she states as being integral and ingrained in all aspects of Montessori are as follows:

1. That movement and cognition are closely entwined, and movement can enhance thinking and learning;
2. That learning and well-being are improved when people have a sense of control over their lives;
3. That people learn better when they are interested in what they are learning;
4. That tying extrinsic awards to an activity, like money for reading or high grades for tests, negatively impacts motivation to engage in that activity when the reward is withdrawn;
5. That collaborative arrangements can be very conducive to learning;
6. That learning situated in meaningful context is often deeper and richer than learning in abstract contexts;
7. That particular forms of adult interaction are associated with more optimal child outcomes; and
8. That order in the environment is beneficial to children.⁹

These principles are the driving force behind the differences one sees when entering a Montessori classroom. A visitor to a Montessori classroom will see children moving around at will, choosing which materials to work with, children working in different areas of the classroom based on their individual interests, children working without extrinsic motivators such as excessive praise or gold stars on a chart, and children who are treated with the utmost respect and regard by the adults in the classroom.

All Montessori classrooms will have common characteristics: the classroom will be a very carefully prepared environment of beautiful and organized materials; the children will be in multi-age groupings with at least a 3-year age span; and the children in the classroom will all be working at different levels with materials.

Primary Montessori

The primary Montessori classroom is made up of approximately 25-35 children ages 3 to 6 years. A child at the primary level enters the classroom on any given day and is greeted personally by the lead teacher and the assistant teacher. The beginning of this child's day at school is an integral part of the Montessori curriculum known as the 3-hour work cycle. During this time period the child has the ability to choose to use any materials on the shelf and to work with them for any desired amount of time. The only limit to this freedom is that the child must have been introduced previously to the materials by the teacher and that the materials must be available and not in use by another child. The child has the freedom for repetition with the materials or to put them away when he desires. This process is repeated with many materials throughout the work period but there may be moments of inactivity or reflection and these are welcomed and encouraged as well. At some point during the work period, the teacher indicates to the child that he or she has a lesson to give him or her. The teacher will have previously planned the lesson and will present it based on child's mastery of previous material in the scope and sequence of the curriculum. For example, after

⁹Lillard 2007, p. 27

observing that a child has mastered the sensorial material known as the Pink Tower where the child is able to discriminate size of cubes that change by three dimensions (each cube decreases in length, width, and height), the teacher will design a lesson for the child on the Brown Stair, a sensorial material that requires discrimination of size based on two dimensions (each prism decreases in width and height).

With the exception of a few lessons in the language and math areas, these presentations are always given one-on-one and are given at a time that the teacher observes to be appropriate. When a lesson has ended, the child has the freedom to put the materials away or to continue to work with them.

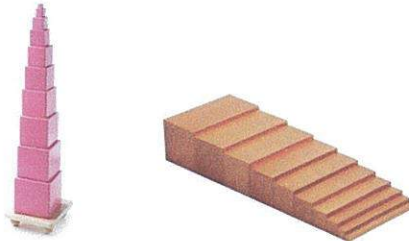


Figure 1. Left, the Pink Tower consists of 10 mathematically exact cubes that decrease in length, width, and height. Right, the Brown Stairs consist of 10 mathematically exact rectangular prisms that decrease in height and width.

The primary Montessori materials are a key component of the prepared environment, and manipulation of these materials satisfies the young child's developmental need to learn by doing. The materials inherently develop independence, concentration, and control of movement while instilling a love of work and the joy of learning.

The four main areas of the classroom are practical life, sensorial, language, and mathematics and each child receives countless individual lessons with the materials in each of the respective areas.

Practical Life

The purpose behind the materials within the practical life area of the Montessori curriculum is two-fold. Initially, the child is drawn to the practical life materials because he is able to complete real life activities with a visible purpose such as tying a lace, food preparation, or washing a table. However, the intrigue for the child is not the only benefit of these materials. Dr. Montessori realized that these were the kinds of activities the young child was drawn to and that they could be used as indirect preparations for later, more academic work. For example, there is a piece of work on all shelves in a primary classroom known as "table washing". Like all of the materials, the table washing is child-sized and visually appealing. It usually consists of a washing basin, a pitcher, a bucket for soapy water, a sponge, scrub brush, and drying towel. The materials are all small enough to be easily wielded by a child and are often color coordinated. To the child, the purpose of the activity is simple: to use the materials at hand to wash and dry a table in the environment. However, the teacher knows that the value of the activity itself is much more complex. When giving a lesson on table washing to a child, the teacher is showing a very specific sequence of events that the child must follow in order to achieve the same results. In order to master table washing, the child must have the ability to follow multiple steps, to exercise gross motor control in carrying water across the classroom, and to stay with the activity for long enough to wet, scrub, rinse, and dry the table. Like table washing, all of the practical life activities are designed to enhance the development of control of movement, sequencing, and concentration through inviting and purposeful work.

Within the sensorial area of the classroom, Dr. Montessori designed a series of materials and lessons that are now often referred to as the cultural work or cultural extensions. The most notable of these extensions at the primary level are music and geography. As part of the child's exploration of sound, primary classrooms have a material known as The Bells, consisting of two sets of 13 bells ranging from middle to high C. The beginning work with the bells has the primary child isolating sounds and matching pitch and extends through basic musical composition.

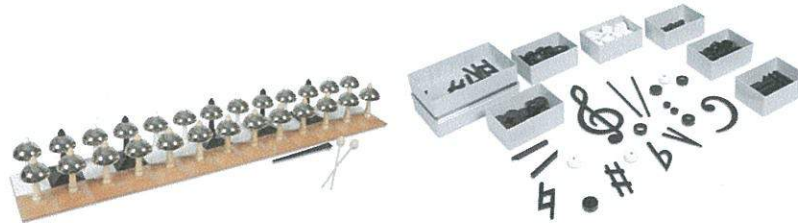


Figure 4. Left: A set of bells for the primary classroom. Right: The materials used with the bells for basic musical composition.

The geography materials are considered part of the sensorial area of the classroom as the lessons all begin with a sensorial introduction to the concept being taught. The wooden puzzle maps are often one of the most popular materials in the classroom, and at first the children just use them as puzzles, moving each piece by grasping a little knob. The first lesson is on the world map, consisting of seven puzzle pieces, one for each continent. After the child has mastered this map, he or she moves to the continent maps, where each puzzle piece represents a country within the respective continent. Finally, the child moves to the map that best represents his or her location in the world. In the US, primary children use the map of the United States. Additional work with geography includes land and water forms (lakes and islands, etc.), nomenclature cards, and country flags.



Figure 5. Puzzle map of the United States

Mathematics

Dr. Montessori often talked about the idea that all human beings have “a mathematical mind,” meaning that the basic human inclination towards order, orientation, exactness, and repetition lends itself to the development of a mathematical system of thought. She believed that introducing math materials to young children during the period of the absorbent mind (birth-age 6), allowed for a lifetime of mathematical thinking. “The results we obtain with our little ones contrasts oddly with the fact that mathematics is so often held to be a scourge rather than a pleasure in school programmes. Most people have developed 'mental barriers' against it. Yet all is easy if only its roots can be implanted in the absorbent mind.”¹⁰ The materials in the math area of the classroom follow

¹⁰ Montessori, p.170

the lesson sequencing seen earlier by first giving the child a concrete sensorial aspect with a material before moving to attach it to a more abstract concept, like addition. For example, the first lessons given in the math area of the classroom are with a material called the number rods. The number rods consist of 10 wooden rods, varying in length, each one 10 cm longer than the previous rod. The shortest rod is red. The second is twice the size of the first; one half is painted red and the other half is blue. The third rod is three times the size of the first and is divided into three sections; the first painted red, the second is blue, and the third red. All the other rods are divided in a similar fashion, alternating red and blue, the first section always being red. The number of sections represents the numbers of the rod.



Figure 6. The number rods.

In the first lesson on the number rods, the teacher isolates the shortest rods and shows the child how to touch and count the colored sections arriving at the cardinal number the rod represents. The child works repeatedly with learning the quantity each rod represents before the teacher introduces the symbol (1, 2, 3, etc.) that correlates to the rod. Later work with the number rods will begin to give impressions of operations. The child can see that placing the 1 and 3 rods together is equal in length to the 4 rod. In this manner, as with all of the subsequent math materials, the child has an extended sensorial experience with the concept (here it is quantity) before the symbol is introduced. Once this skill is mastered, the child moves on to the next math lesson which, in the primary classroom, can extend through work with fractions. (See section on Student Learning Standards for more information).

Language

Language arts education in a Montessori classroom is vastly different from that of a traditional classroom. While all of the same concepts of sound isolation and phonemic awareness and blending are taught, Montessori realized through her observations that the young child's mind was ready to begin writing far before his hand was ready for mechanical writing. Therefore, in the primary Montessori environment we demonstrate forming words and phrases with a material known as the moveable alphabet first and see the child's beginning reading follow shortly after. Before the child begins using the moveable alphabet, usually around ages 3½ - 4, he or she has experienced a total immersion into language. They have played sound games where they have isolated beginning, middle, and ending sounds; they have worked with vocabulary enrichment cards; they have listened to poems, songs, and stories; and most importantly they have been spoken to using exact and enriching vocabulary by the adults in the classroom. When the child is introduced to the moveable alphabet, a large box containing easily manipulated plastic or wooden letters, he or she now has a tool in which to begin to express ideas with all the language he has been amassing. He or she begins by making simple phonetic words and moves quickly to phrases and eventually stories. Reading emerges spontaneously during the months after this writing begins. The outcome of this deliberate sequence of language lessons which includes sound isolation and phonemic awareness enables the child to master what Dr. Montessori referred to as "total reading" by the age of 6.



Figure 7. A child uses the moveable alphabet to write his name.

Elementary Montessori

The primary Montessori program serves as the basic foundation for learning at the elementary Montessori level. As such, the key principles of the Montessori method, most importantly that of self-discovery through the freedoms of choice and time, apply to the activities of the developing child between ages 6-12. And yet, Dr. Montessori understood that the educational program of the elementary child “is not a direct continuation of that which has gone before, though to be built on that basis”. Within the first six years of life, the developing child has acquired the ability to walk, talk and get along in terms of his functional independence. But there is so much more to life, to being human, and the emerging elementary child is ready to throw open his reasoning mind in a quest for more knowledge.

The framework for the learning standards in the elementary Montessori program is referred to as the “Cosmic Education” or the “Five Great Lessons” (The Story of the Creation of the Universe, The Story of Life, The Story of Humans, The Story of Language, and the Story of Signs and Symbols). These lessons are taught each year in the Montessori elementary classroom and each acts as the overarching catalyst (or unifying standard to use conventional educational terms) for further research and study throughout the subject areas. The “Great Lessons” give the child the words to think, communicate and explore his universe. As the elementary child is developing his abstract thought process, imagination is used as a key component of the elementary program as a way for the child to better understand his world so he can make relationships in his mind. The elementary child wants to know what people do in our society, in our community, and in our culture so that he may also enter into this life of humanity. The elementary guide (teacher) cannot bring every human experience to the child, but she can bring stories, pictures, impressions, measurements, etc. so that he is more developed to see. For this reason, the subject matters covered at the elementary level go beyond the immediate and beyond the sensorial.

As with all of the Montessori curricula, the subjects are not taught in isolation but are intertwined and encourage the child to think and wonder. Dr. Montessori writes of the elementary child that “his intelligence becomes whole and complete because of the vision of the whole that has been presented to him, and his interest spreads to all, for all are linked and have their place in the universe on which his mind is centered”. The Story of the Creation of the Universe explores the origins of the universe and is followed up with lessons and student driven explorations in physics, astronomy, geology, and chemistry. The Story of Life represents the beginning of life from one-celled organisms to human beings and 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. The Story of Humans is the basis of lessons in prehistory and the emergence of ancient civilizations. The lessons encompass typical social studies standards and lead into extensive

lessons in history. The Story of Language follows the development of writing from its appearance in primitive cultures to its role in modern society, covering the origin, structure, and types of writing and speaking. This includes conventional grammar lessons and different forms of writing such as poetry, narrative, and plays. The Story of Signs and Symbols is the basis of the math curriculum, which is presented with concrete materials that cover areas of arithmetic, geometry, and algebra.

The goal of a cosmic education is to orient the child to the universe and its interwoven parts. The basic areas of study (history, language, mathematics, geography, science, music and art) provide the elementary child with ample experiences to draw on as opportunities for reasoning. There is no ceiling to a cosmic education. All subject matters grow from these basic areas of study. The layout of the elementary Montessori classroom in addition to the methods of instruction aids the child in his ability to think and make relationships in his mind. The goal of the elementary Montessori activities and materials is to provide the child with sensorial impressions and meaningful language that allow him to organize his thoughts.

In all areas of study, the work of the child is multifaceted and ongoing. He must review concepts studied by repeating activities and demonstrations. It is also important that the child explores concepts sensorially as well as through artistic work which allows for building images and reflection (i.e. drawing geometric designs, illustrating a report, making an historical timeline, etc.). Some subject areas, such as language and mathematics, require the child to memorize terms and definitions in order to further explore these areas of study (i.e. math facts, parts of speech, etc.). The child must observe and explore phenomena related to the area of study (i.e. communication skills are developed by listening to speeches, making speeches, etc.). The work of the child is to formulate concepts verbally and acquire skill in his ability to communicate, in his computation, in his problem solving, etc. Research is a major component of the elementary classrooms and serves as a means for students to follow their own interests, to share their discoveries, and to work collaboratively.

2. GOALS AND STUDENT ACADEMIC ACHIEVEMENT EXPECTATIONS

EARLY CHILDHOOD GOALS

Lee Montessori PCS will use the Public Charter School Board's Performance Management Framework (PMF) policy (currently in public comment) to set our academic achievement expectations. In the first five years of operation, our enrollment will go through third grade, so the majority of our goals will be calculated using the PMF Early Childhood Guide. In developing our goals, we had to first decide which assessment tools will be appropriate for the population of students we expect to be serving.

We will use Teaching Strategies' GOLD assessment as our primary data collection tool for the students considered PreK-3 and Pre-K4, as it measures growth over time in seven dimensions: social-emotional, physical, cognitive, language, literacy, and mathematics. The assessment tool is user-friendly and captures a wealth of documentation and information about each individual child. In addition, the GOLD assessment is a bilingual tool and can offer teachers support in assessing ELL learners. Furthermore, founder Megan Hubbard worked with a group of DC Montessori educators during 2011 to align the GOLD assessments with the primary Montessori curriculum.

For our grade K-2 students, we will be using the Dynamic Indicators of Basic Early Literacy Skills (DIBELS) to assess and monitor our students' progress on early literacy skills. This assessment tool is widely used in District of Columbia schools and can be used to assess children from grades K-6. Furthermore, the DIBELS assessments use the same technology as the GOLD assessments, which will be convenient to teachers who have students using both assessments.

We have not yet identified a math assessment to be used for our K-2 students but will explore what other public Montessori schools in the area are using. If no appropriate assessment tools are found, we will develop our own math assessment.

Finally, all students in grades 3-6 will take the Partnership for Assessment of Readiness for College and Careers (PARCC) Assessments and any relative progress monitoring assessments as required by the District of Columbia.

LEE MONTESSORI PCS ACADEMIC ASSESSMENT GOALS

Student Progress Targets

1. 75% of PreK3 and PreK4 students will demonstrate an average of one year's growth in literacy by the spring checkpoint on the Teaching Strategies GOLD Assessment.
2. 75% of PreK3 and PreK4 students will demonstrate an average of one year's growth in math by the spring checkpoint on the Teaching Strategies GOLD Assessment.
3. 70% of K-2 students will demonstrate one year's growth by the spring administration of DIBELS.
4. Student Achievement Targets
5. Annually, 75% of Kindergarten students will score "low risk" for reading on the DIBELS spring assessment.
6. Annually, 70% of 1st and 2nd grade students will score "low-risk" for reading on the DIBELS spring assessment.

Leading Indicators

1. Annually, on average, prekindergarten-3 and prekindergarten-4 students will attend school 88% of the days.
2. Annually, on average, kindergarten-second grade students will attend school 90% of the days.

Special Education Goals

Lee Montessori PCS is committed to providing the full continuum of services to children with disabilities to the maximum extent possible. To that end, each school year, 100% of students referred for evaluation for special education will receive timely evaluations in all areas of suspected disability and appropriate placement as warranted in accordance with the procedures under IDEA and DC Code. We will exhaust the full avenues of technical support including the OSSE, PSCB, and other community based organizations prior to referring a student to placement in a more restrictive environment. This will be monitored by regular auditing of SEDS and RTI assessments.

Organizational Goals

Lee Montessori PCS will become recognized by the Association Montessori Internationale (AMI) a world-renowned organization founded by Dr. Montessori that upholds her theory and practices. Only six schools in the District of Columbia are recognized by AMI. Once accreditation is achieved, families can be sure their children are receiving an exceptional Montessori education.

3. CHARTER SCHOOL CURRICULUM

A. STUDENT LEARNING STANDARDS

We will follow the Montessori learning standards as laid out in the Association Montessori Internationale approved curricula for the primary and elementary classrooms. This includes lesson guides and very specific materials that encompass the traditional areas of language arts, math, science, and social studies. We have chosen these standards as they are currently being taught in AMI Teacher Training courses across the world and they have been proven effective in Montessori classrooms for over 100 years.

We recognize that, while the AMI Standards are known and understood within the Montessori community, we also need to ensure that our students, upon leaving Lee Montessori PCS, will be on track to be college and career ready, with the well-rounded skills to active participants in the global society. To that end, we will work in our planning year to ensure that all of the Common Core Standards are being met, if not exceeded by the scope and sequence of the primary and elementary curricula at Lee Montessori PCS. In 2012, Anna Perry of Seton Montessori Institute and Stacey Edwards of the Montessori Accreditation Council for Teacher Education (MACTE) led an effort to correlate the National Common Core Standards with the primary and elementary Montessori curricula. This document is a foundational representation of what Montessori educators have known for years; that an authentic Montessori curriculum meets and often exceeds the current national standards. See Appendix J for *Montessori and the Core Standards – An Initial Alignment and Correlation*. We will use this alignment as the basis for ensuring our students are learning the same skills as children using the Common Core Standards all over the country and are prepared for the PARCC and to help us develop our own alignment tools if necessary.

B. RESOURCES AND INSTRUCTIONAL MATERIALS

Within the first five years of operation, Lee Montessori PCS will serve children in three primary, two lower elementary, and two upper elementary classrooms. Each of these classrooms will need a full set of AMI-approved materials corresponding to the age of its students.

As we have discussed, the instruction in a Montessori classroom is not teacher-centric as in most traditional classrooms. The driving force in each classroom that allows for the teacher to spend her time giving individual lessons is the materials, themselves. After observing how school-aged children were drawn to sensorial development apparatuses, Dr. Montessori spent years developing and testing an entire set of materials to be used in conjunction with her methodologies. The materials allow for the child to engage in self-directed exploration and purposeful activity and have built-in controls of error, which allows the child to receive immediate feedback during his work. The materials comprise the majority of the lessons in practical life, sensorial, mathematics, language, geography, music, and cultural extension and are imperative to the success of a Montessori program.

In order to be considered for AMI affiliation, no other curriculum resources besides the Montessori materials can be used during the instructional day; therefore our required resources will be a full set of an AMI approved materials for each classroom. In accordance with AMI standards, these materials must be purchased from an AMI approved vendor. These materials encompass all areas of instruction for early childhood, lower elementary, and upper elementary and, as discussed, will be fully aligned to the Common Core Standards with all instruction meeting or exceeding those standards.

A full list of required materials each classroom can be found in Appendix J.

C. METHODS OF INSTRUCTION

Methods of Instruction

The multidisciplinary materials and lessons of the Montessori curriculum make it highly relevant to the differentiated instruction necessary in today's education culture. The instruction itself in a Montessori classroom is vastly different from that of a traditional classroom. The teacher does not stand in the front of the room imparting the same information onto every member of the class, consequently expecting that everyone will be learning and working on the same concepts at the same time. Instead each child receives individual lessons from the teacher on each piece of material according to their own developmental path and needs. Students are able to move freely within the environment and spend as much time with a material or lesson as they need in order to reach mastery. This phenomenon is achieved through one of the key pieces of the Montessori method: the three-hour work cycle. Both the primary and elementary class models contain at least one three-hour work period per day. During this time all students are "working" in the classroom, meaning they are utilizing the materials to which they have been introduced and are working towards mastery in these lessons. The students have the freedom to choose any of the materials with which they have familiarity. During this time, while students are working, the teacher is giving lessons to individual students in accordance with their personal learning plans. Some of the more advanced work for the 5 and 6 year olds in the classroom requires working in pairs or small groups. This would entail some small group instruction by the teacher and students working together towards a common goal.

In the mixed-age classroom, the social success of the classroom relies on the older and more experienced children acting as role models for the younger children, in both behavior and academics. We even see some peer-assisted learning strategies when the older children are able to present materials to children or give them redirection as a response to misunderstanding. As we mentioned above, all of the materials in the classroom are sensorial-based, and as the lessons move from the concrete to the abstract, they are accessible to a variety of learning styles: kinesthetic, visual, and auditory. This is a quintessential multi-sensory environment and these various methods of instruction are used for all of the students in the environment, including any Students with Exceptional Needs and English Language Learners. The methodologies that are often most successful for these students with exceptionalities are already inherent in the Montessori model. Because each child has their own individual learning plan and are able to work at their own pace in this multidisciplinary environment, each child's strengths and weaknesses are taken in to consideration. The teacher is able to give the instruction necessary to guide the child into mastery of all the materials and lessons, ultimately enabling students to achieve the knowledge and skills required to perform at the highest level.

Determining Readiness for New Instruction Through Continuous Assessment of Student Progress

Assessment and monitoring of student progress looks much different in a Montessori classroom than in the traditional classroom. The materials are designed to provide the child with feedback and each has its own control of error so the children can discover for themselves if they have mastered the work. Although this is a self-directed environment, there are many ways in which the teachers also provide continuous assessment through observation, three period lessons, and recognition of mastery and transference, as described below.

Observation

Maria Montessori believed that observation is the most important task of the teacher. When undergoing their Montessori training, teachers spend many hours perfecting the art of “active observation” and through this daily observation are able to notice all areas in which a child may need a check for understanding or redirection with the use of a material. This astute and constant observation helps to maximize the child’s experience, ability, and independence. Specifically the teacher is observing student use of materials, student awareness of the self-correcting aspects of materials, and exhaustion of all experiences with the materials including language, repetition of activities, success with materials, and readiness for next level of presentation.

Three Period Lesson

The three period lesson is used to teach vocabulary at all levels of Montessori instruction after the child has had the experiences and exploration with the concrete manipulative materials. In the first period of the lesson, the teacher shows the child how to connect the vocabulary with the material. In the second period the teacher gives the child several experiences with the vocabulary and material so that his/her subconscious is recognizing and relating the vocabulary. Finally, in the third period the teacher gives the “test of knowledge” and elicits the vocabulary from the child. The final piece of a three period lesson is a quick assessment where the teacher is able to determine whether or not the child has learned the language and can connect it to the material.

Mastery and Transference

The most finite method of assessment comes from the materials, but the teacher is able to observe and document work with the materials to plan for further lessons. Each child must demonstrate mastery of one material before moving on to the next material and its lesson, expanding upon skills previously learned. Because every lesson has a clear prerequisite and following lesson, and a clear sequence of materials, the teacher and sometimes even the child will know when it is time for the next lesson. Mastery can be measured by the transference of skills. For example, when a child is skipping steps but still finding the correct answer while working with a math material, the teacher can assess that the skill has been mastered and it is time for the next lesson.

The assessment methods discussed above are applicable to both the primary and elementary classrooms. In addition, the Montessori elementary classroom employs student self-reporting as a form of assessment. Elementary Montessori students use work journals to record work choices, the time spent on materials, choices made during the 3 hour work period, and what lessons they’ve had. The elementary child has frequent conferences with the teacher to discuss his/her progress and the quality of his/her work.

D. STUDENTS WITH DISABILITIES

Students with Disabilities

Nationwide, 13% of children are identified as students with disabilities. In our nation's capital, that number is a significantly higher 18%.¹¹ With this knowledge, a strong special education program and flexible accommodations will be a key aspect of meeting our learning standards. Montessori classrooms are, by their nature, completely child centered and inherently least restrictive environments. This methodology of teaching, combined with a strong identification process, will ensure a strong and successful intervention programming for students with exceptionalities. In addition to internal programming and support, the leadership at Lee Montessori PCS will work with outside organizations such as the DC Special Education Cooperative and will send staff to the newly planned AMI-USA training course on Students with Disabilities.

We will use a two-part system to identify students with exceptionalities. In recent years, schools have experienced improved identification and increased student achievement by using a Response to Intervention (RTI) program. A robust RTI program will be employed that includes, most importantly, scientific, research-based instruction, universal screening, progress monitoring, and where necessary, remediation strategies and testing for exceptionality based on a tiered system of intensifying support.

Our RTI program will be led by the Special Education Coordinator and will use universal screening, progress monitoring, data-based decision making, and prevention techniques to effectively identify and manage behavioral and learning challenges for all individual students.

All students entering the school are considered Tier 1 and, based on data collection regarding student progress with respect to response to instruction, it may be deemed that additional student support is needed. These students will be referred to Tier 2 status of RTI, a classification that will determine the continuum of services necessary. A student entering Tier 2 will have a Student Support Team (SST); this is the second part of our identification system. The SST includes an administrator, teacher, support staff member, and the student's parent. This team meets in order to identify the student's needs and provide an action plan for intensified intervention and support and further monitoring. In the event that data still does not indicate success in a specified time period, students will progress to Tier 3 of RTI. At this tier additional out of classroom resources may be deemed necessary, which may include further testing for exceptionalities.¹²

Evaluation Process and Delivery

A student identified at Tier 3 will be referred to the second part of our identification system, the Student Support Team (SST). A strong SST is integral for identification and implementation of students with exceptionalities. The SST at Lee Montessori will be comprised of an administrator, teachers, support staff, and the individual student's parent.

The SST will meet regularly to review referrals and to schedule and execute observations of students in question. The SST will determine if and when a student will be evaluated for special

¹¹ DCPS Facts and Statistics, 2012.

¹² Note: In the rare event that extreme needs are not being met, a student can directly move to a higher tier for immediate support.

education and other related services such as speech and occupational therapy. It is important to note that students may also be referred directly by a parent in writing.

At the point that a student is deemed eligible for special education and/or related services, an Individualized Education Plan (IEP) meeting will be held with the parents, teachers, and the special education coordinator to discuss the student's needs and the plan to support them. This meeting will result in the writing of an IEP plan that contains the specific services the child will receive from instructors and the annual goals set for progress. The student's progress will be monitored throughout the year, and the IEP team will reconvene yearly to evaluate progress and to update the goals and services laid out in the IEP. After three years, the student will be reevaluated to determine if a disability is still present.

Pursuant to Individuals with Disabilities Education Act (IDEA), students with disabilities will receive special education in the least restrictive environment. These students will be educated with their nondisabled peers to the maximum extent possible. As the three-hour work cycle is integral to the success of the Montessori method, we will work to preserve that time period for the student with disabilities to stay in the classroom with his nondisabled peers and target special education pull-out time from the classroom will occur during other periods of the day. Lee Montessori PCS will provide a continuum of services consistent with the Montessori model to include support in the general education classroom, modification of the general education curriculum, and pull-out special education services if appropriate as deemed in the IEP as suggested through the conclusions of evaluation. When necessary, Lee Montessori PCS will use the services of outside agencies to provide qualified staffing for necessary services. If a student's special education needs exceed the capacity of Lee Montessori PCS, the school will ensure the student receives a free and appropriate public education (FAPE) by referring to the Office of the State Superintendent of Education (OSSE).

Lee Montessori PCS will adhere to Section 504 of the Americans with Disabilities Act (ADA) and as such will ensure that the requirements surrounding the evaluation for 504 eligibility are implemented consistently and with fidelity across classrooms. Just as the RTI process operates for evaluation of students with special education needs, Lee Montessori PCS will use formal evaluations to assess for 504 eligibility to determine if a student has a physical or mental impairment that substantially limits one or more major life activities. Students will be provided accommodations and related services as outlined in the student's 504 plan. Classroom teachers will receive training on implementing 504 plans through on-going support and professional development.

E. ENGLISH LANGUAGE LEARNERS

English Language Learners

Identification

Students who are considered English Language Learners (ELL) can be found all over the city, with the highest concentrations in Wards 1 and 5. As we expect we will have ELL students enrolled in Lee Montessori PCS, we will follow the U.S. Department of Education's Office for Civil Rights six steps of progression through an ELL program.

1. **Enrollment.** Lee Montessori PCS enrollment procedures will in no way discriminate based on English language proficiency or immigration status. Our enrollment and registration

forms will be designed specifically so as not to expose a parent's or student's immigration status or language proficiency.

2. **Identification.** Once enrolled in the school, all students will be given a home language survey similar to the one currently administered by DCPS. These language surveys will be reviewed to identify any students that have another language spoken at home and may be eligible for ELL services. In addition, families can use the home language survey to indicate if they would like to receive school notices in a language other than English.
3. **Assessment.** Students identified by the home language surveys will be administered the *Assessing Comprehension and Communication in English State-to-State for English Language Learners (ACCESS)* test in accordance with the guidelines set forth by the test's publishers.
4. **Placement.** The rate of incidence of ELL students at Lee Montessori PCS will determine what the most effective placement of services will be, but we foresee using an English as a Second Language (ESL) model with push-in teaching by ELL staff and additional language support by the classroom teacher.
5. **Transition.** All students in an ELL program will be assessed annually using the ACCESS test. Students will exit the ELL program once they have gained a proficiency in English that allows them equitable access to the curriculum.
6. **Monitoring.** The school will monitor students who have officially completed an ELL program for two years after their transition to ensure that students exited from the language support program are performing in the general education program without significant barriers primarily caused by limited English proficiency.

Placement

We anticipate using an ESL model at Lee Montessori PCS, as we know that the Montessori classroom is already an ideal model for ELL students. At the primary level, all initial lessons are given with minimal language, as the teacher does not want to distract the child from the visual input with any verbalization. This allows the students to absorb all of the attributes of the materials and analyze each step of motor skills needed. All students, regardless of language proficiency, are able perceive and comprehend the sensory attributes of the materials. Once the child has mastered the purpose of the materials, then the teacher gives the child a lesson on the appropriate language associated with the material (e.g. the terms "large" and "small" in reference to the pink tower cubes). An instructional method used constantly when teaching language in the primary environment known as the Three Period Lesson (see Methods of Instruction section above) mirrors one of the strategies used in language development: Identity, Recognition, and Recall. Repeated careful three period lessons will enable ELL students to develop precise communication skills and to expand his/her vocabulary. In addition, if necessary, contracted ESL services may be brought in to the classroom to help the teacher integrate English proficiency standards in to the existing Montessori curriculum.

F. STRATEGIES FOR PROVIDING INTENSIVE ACADEMIC SUPPORT

Academic Support

A robust Response to Intervention (RTI) program will be employed that includes, most importantly, scientific, research-based instruction, universal screening, progress monitoring, and where necessary, remediation strategies and testing for exceptionality. The nature of Montessori education is highly compatible with a tier-based system of increasingly intense and research-based intervention and monitoring of student response to instruction for students behind grade level or

struggling either academically or behaviorally. (Research shows that behavior affects achievement in all academic areas¹³) Lee Montessori Charter School will implement a Response to Intervention program that creates a progress-monitoring system that encompasses both Montessori aims and state standards.

In order to assess needs, all entering students are at the Tier 1 level of RTI and are universally screened to set a baseline and future benchmarks for further progress. As stated previously, Montessori education is based on each student in the classroom and the lesson plans are catered towards each student's specific achievement and needs. When students are identified as being behind grade level or struggling, their progress will be more closely monitored through regular data collection, using a program like aimsweb (a web-based a universal screening, progress monitoring, and data management system that supports RTI and tiered instruction) or an in-house assessment for 6 week increments, to analyze their response to changes in instruction. In the event of inconsistent or non-existent progress they will be referred to a higher level of tiered support through RTI. A student entering Tier Two will have an RTI team -- including administrators, teachers, support staff, and the student's parents -- meet in order to identify the student's needs and provide an action plan for intensified intervention and support. Interventions will include research based remediation strategies including, but not limited to, individual tutoring and afterschool program support. The team will meet regularly to assess progress and determine the need for ongoing intervention or higher support in Tier 3, which may include testing for special education services.

G. STRATEGIES FOR MEETING THE NEEDS OF ACCELERATED LEARNERS

Accelerated Learners

As discussed previously, the Montessori environment inherently tailors instruction to individual student needs and provides a rich environment capable of supporting exceptional learners. As each classroom is based on a three-year learning cycle, children have the freedom and ability to work up to three grade levels above their assigned grade placement. Each child has his/her own individual lesson plans and can work at his/her own pace. In cases where the child has exhausted all of the materials and lessons in the primary classroom, he/she will be able to receive instruction and lessons from the lower elementary classroom. The same progression applies to students in lower elementary to upper elementary.

4. GRADUATION/PROMOTION REQUIREMENTS

PRE K - MIDDLE SCHOOL

Students will be promoted to the next level (primary, lower elementary, upper elementary) based on the recommendation of the teacher and approval by the head of school. In a Montessori environment, the best practice for promoting students to the next level is based on social and academic development, which does not necessarily coincide with the academic school year. We will

¹³ Georges et al. "Links Between Young Children's Behavior and Achievement". American Behavioral Scientist July 2012, vol 56:7 pgs. 961-990.

promote fluency between the classes, where children may visit the upper classrooms for short periods of time to determine when they are ready to advance. In the same sense, we recognize that there are times when an older student may need to revisit a lower classroom be it for a behavioral intervention or for some academic help. In addition to the teacher recommendation and mastery of materials in the classroom, data from our continuing assessments will be taken into consideration for promotion.

5. SUPPORT FOR LEARNING

A. FAMILY INVOLVEMENT

Lee Montessori PCS believes that family involvement is a key component for a comprehensive and rewarding Montessori student education. We feel that family engagement deeply impacts each student's development and achievement. We will encourage families to be actively engaged in their child's education. Through efficient communication and shared knowledge, Lee Montessori PCS's staff and family members will work together to create a place of learning and well-being, contributing to each student's social, emotional, and mental growth.

Lee Montessori PCS will expect family participation in school events throughout the school year, such as seasonal celebrations, performances, school fairs, open houses, and end-of-the-year events. These school events provide opportunities for families and the Lee Montessori PCS community to work and celebrate together.

Lee Montessori PCS fully understands that there is often a socio-economic gap between our potential students and staff. Therefore we will work with our teachers and staff to guarantee an understanding of the culture and lifestyles of our students and families. This will be one of the first steps towards strengthening the bond between the families and the school staff.

We are very aware that the Montessori curriculum may be new to many parents who will be placing their children at Lee Montessori PCS. With that in mind, we will be holding monthly family workshops in the evenings where school staff and family members will come together to discuss Montessori theory, the work their children are doing in the classroom, and strategies for continuing this work at home. In the first year we will focus mainly on the theory behind the materials so parents can expect to attend workshops on the topics of Practical Life, Sensorial, Language, and Mathematics. As our new families become more accustomed to the Montessori curriculum through Lee Montessori PCS's family workshops, we will incorporate other topics of interest to parents such as Dr. Montessori's theories behind the human behavior, the four planes of development, and freedom and discipline.

Once we have an established parent- family base and funding becomes available, we plan to develop a family resource room at the school as a part of our commitment to the education of our community. This family resource room will be available to our students, our teachers, and our parents/families. Lee Montessori PCS will provide regularly scheduled programs and events for parents and families. The Family Advisory Council, a group of parents and family members of current students who will provide input to the Board and the Head of School on topics affecting the schools culture, along with input from the administration and staff, will determine the focus of each program. Until adequate funding is secure, programs will be led by community volunteers or organizations working pro bono. Possible programs will include the following:

- Providing opportunities to meet with representatives of local agencies and organizations for assistance information
- Providing resources to create parent support groups
- Providing support for families struggling with social and emotional problems through counseling

Additional education topics for families and parents may include the following:

- GED workshops
- College application workshops
- Resume building workshops
- Adult literacy
- Personal finance management
- Computer courses
- Job readiness training
- Interview coaching

By providing support and resources to our parents, we can more easily meet the needs of our students' families, strengthening the Lee Montessori PCS community.

We will have parent participation on our board and we anticipate the establishment of a parent/family/teacher organization to facilitate opportunities for fundraising, support, problem solving, and discussion. The Montessori approach empowers both families and children to become advocates for their education and we will send regular reports home to all parents letting them know how the school as a whole is doing in terms of the PCSB's PMF goals and as we work towards achieving AMI Montessori accreditation.

B. COMMUNITY PARTICIPATION

How will the community be engaged in the planning, development, and implementation of the proposed school?

Lee Montessori PCS recognizes the importance of constructing a strong network among the school, the families and the DC community to generate a thriving educational environment for our students. Lee Montessori PCS is currently working to foster partnerships with local and national organizations to strengthen our academic and extracurricular programs. Our partnerships will be founded on the basis that each entity understands and values Lee Montessori PCS's mission as a charter school and will enhance the school community through providing their resources to our students, staff, and families.

Community Partnerships

Community Partner	Stage of Partnership	How It Builds School Capacity
Association Montessori Internationale USA	In discussion regarding New School Accreditation	Montessori consulting and AMI accreditation
Maitri Learning	Letter of Support	Montessori materials/AMI Montessori Teacher Mentoring Services
The Julianna Group	Pending final approval (as discussed with President Sharon Lerch)	AMI approved Core Montessori materials and furniture at a discounted rate
MarbleRoad	Letter of Support	Health programs designed specifically for

Community Partner	Stage of Partnership	How It Builds School Capacity
		Lee Montessori PCS student
Washington Montessori Institute of Loyola University	Letter of Support	Professional development for teachers and assistants
Friendly Design Co.	Letter of Support	Marketing, design and media development; after-school art program
FOCUS DC	Contract	Ongoing charter consultation
EdOps	Contract	Ongoing business, financial, and operations consultation
Girl Scouts	Pending final approval	After school programming
Lifting As We Climb	Letter of Support	Mentoring/tutoring
Building Hope		
Holly Brook Montessori School	Letter of Support	School-to-school partnership

C. SCHOOL ORGANIZATION AND CULTURE

Lee Montessori PCS – School Culture

A core value in the Montessori curriculum, and one that will be inherent in the culture at Lee Montessori PCS, is the development of student leadership skills within both the classroom environments and school-wide. In the mixed-age classrooms students learn from one another and lead one another as they progress academically and develop socially. Teachers create an individualized educational goal for each student, based on observations and initial lessons. This allows a student to smoothly and positively enter the classroom at any time throughout the school, and without overwhelming the current students.

The Montessori method has proven effective over the last 100 years in boosting student achievement and increased learning. Through the teacher's observations and documentation of each individual student, each student is held accountable for his/her own active decisions regarding his/her own learning. Once a Montessori lesson is presented to the student by the trained teacher, it then becomes up to the student to follow through with repetition and the learning process, with constant, yet discreet, observations by the teacher. This ultimately gives the student the keys to his or her own education. The student is expected to take responsibility in making sound, positive decisions towards learning.

This process allows the student to play a direct and active role in his or her own education. Because the Montessori teacher is highly trained, he or she can determine when a student is struggling to become engaged in age appropriate work and activities or lacks self-direction. In this instance, the teacher will often use the resources available in a multi-aged classroom to redirect the child's focus. He or she may pair the student with an older child, a role model, to help the struggling student stay on task. The teacher may also re-present a lesson that he or she feels may be of extreme interest to the struggling student. In some cases, a teacher may choose to invite the struggling student to follow, or stay near, him or her while presenting other lessons to other students. This often reminds the struggling student of work and activities that are available that they find interesting, bringing the student back to a place of calmness, concentration, and proper decision making.

Maria Montessori said, "We must lay the foundation for peace ourselves by constructing a social environment, a new world for the child and the adolescent, so that their individual conscience may develop. A vast education reform and above all a vast social reform for today." Lee Montessori PCS will strive to adhere to these words by building a strong sense of community through a strong peace curriculum. Through grace and courtesy lessons each child will be taught and expected to uphold these three principles at all times:

1. Respect for self and for others
2. Care and compassion for self and others
3. Resolution of conflicts with words

The elements of peace education will be upheld in all areas inside and outside of the classroom, including special subject classes where the specials teacher may not be well versed in the Montessori Method. Students at Lee Montessori PCS will achieve higher academic learning in a peaceful environment. Once the school is chartered, we will draw up a code of ethics for the student body based on Maria Montessori's work on peace and conflict resolution.

D. EXTRACURRICULAR ACTIVITIES

Extracurricular Activities

Lee Montessori PCS plans to offer a range of extracurricular activities that will reflect the mission of Lee Montessori PCS and stay true to the Montessori principles. Lee Montessori PCS will offer early morning and after school care, and after school activities geared towards academic, social and cultural enrichment.

Extracurricular Director

A full time extracurricular director will be on staff at Lee Montessori PCS. This person will be responsible for the planning and implementation of all extracurricular activities. The Extracurricular director will work in tandem with the Operations Manager to ensure adequate resources for each program's success. This person will also report to the Curriculum Director to ensure these programs are aligned with the Montessori approach to education.

Early Morning Care

Early morning care will be offered at Lee Montessori PCS every day school is in session. There will be a small weekly fee to provide adequate staffing; however the fee will be determined by the family's income. Children will be welcomed into the facility no earlier than 7:30 AM and will be dismissed to class at 8:55 AM. Children will be grouped by age (ex. 3-5, 6-9, etc.) in either separate classrooms or common areas depending on the facility. During Early Morning Care children will be offered breakfast. Lee Montessori plans to offer free breakfast to all children. Breakfast will be available between 7:45 AM and 8:45 AM. Therefore, children who arrive at any time before 8:45 am will have the opportunity to eat. Once a child has eaten breakfast, he/she will have the option to participate in low-key activities, such as arts and crafts, and group and individual reading under the supervision of the Early Morning Care staff. Children may also use this time to complete school assignments and projects with the help and guidance of the staff.

After-School Care

Lee Montessori will provide a safe, lightly structured environment where students can interact freely with friends while enjoying board games, outdoor play (if facilities allow), and a variety of activities. Once again, the children will be grouped by age and placed in separate areas throughout the building. All students enrolled in After-School Care will be offered a light, healthy snack. After-School Care will be less structured than the student's Montessori day, yet the program will follow the same guidelines and expectations. The Extracurricular Director as well as the staff, classroom aides and teachers, who will be familiar with the Montessori Method, will closely monitor this as compensated After-School Care employees. The fee for After Care will be determined by each family's income.

As part of the After-School Care program, our students will partake in activities such as basic music, art and PE courses. Each will be offered once per week per age group, so every child will have the opportunity to participate.

After School Activities

Lee Montessori PCS plans to offer a wide variety of activities to our students. During the first few years, our facility will govern what programs we will be able to offer. To start, we will offer much more extensive programs than found in After-Care such as group art classes, group and individualized music lessons, martial arts and beginning group dance classes. We plan to include Lego robotics, a Girl Scout troop, a science club and chess club. We will expand our programs as the school grows. All parents will be required to pay an additional fee for their child to participate in each activity. We will keep this fee as low as possible so that all children can participate. Ultimately, if funding becomes available, we would like to offer these classes for free to our students.

E. SAFETY, ORDER, AND STUDENT DISCIPLINE

Lee Montessori PCS – Safe and Orderly Environment

It will be the top priority that all students of Lee Montessori PCS are physically and emotionally safe while at school. School procedures involving safety and discipline will be outlined in the student code of ethics. Consequences for disrespectful or continually disruptive behavior will depend on the severity of the offense. Lee Montessori PCS's written code of ethics will outline appropriate responses to disrespectful or continually disruptive behaviors.

Lee Montessori PCS will strive to create a community of students and staff who model peace and respect for all others, thus remaining true to the non-authoritarian, child-centered Montessori philosophy. The teacher-created Montessori environment allows students to make correct decisions, based upon mutual respect and trust, in their class setting and throughout the school. Beginning at age 3, Lee Montessori PCS will foster a safe and orderly community where children can grow to become internally motivated (through the core Montessori materials), self-disciplined and emotionally self-regulated (through grace and courtesy lessons). Each student will learn the social skills needed to become a respectful advocate for his or her own local community and, with time, will transform into socially responsible citizens of a larger global community.

Prior to the start of the school year, each student and their families will be presented with the Lee Montessori PCS Code of Ethics Handbook, which will outline the school's behavioral expectations and consequences of both the student and family members. The handbook will also describe the school's discipline policy as well as the students' and families' rights and responsibilities as well as expectations. Each student and family will be required to return a signed copy of the Code of Ethics, confirming his or her understanding of the policies before or on the first day of school. These policies will be reviewed throughout the school year during Family Education Nights and Family/Teacher conferences. Expectations will include, but are not limited to, respect of self and the environment, inclusion and acceptance of all individuals, and responsibility for one's actions, including the acceptance of consequences if poor decisions have been made. In the event these expectations are not met, the teachers will first provide corrective actions while adhering to the Montessori Method such as redirection, reminder of expectations and consequences, and limiting privileges for an appropriate amount of time.

If actions such as these listed above prove ineffective or if behavioral issues are repeated, the Head of School will create a behavioral plan with the teacher, student and parents. All efforts will be made to ensure positive behavioral changes. In the unlikely event a student is unable to meet behavioral expectations to the extent that his/her, or any other student's, education is compromised, the Head of School will consult the Board of Directors on suspension or expulsion. The family will have the right to appeal the Board's decision if found unsatisfactory.

Lee Montessori PCS will not tolerate the following from staff, students, or family members:

- Fighting
- Bullying
- Insolence
- Profane or vulgar language
- Stealing
- Cheating
- Arson
- Harassment
- Sexual misconduct
- Possession of a real, look-alike or pretend weapon or firearm
- Possession or sale of drugs
- Possession of alcohol
- Intoxication
- Threats of violence
- Leaving campus without permission or notification
- Class disturbance in excess

F. PROFESSIONAL DEVELOPMENT FOR TEACHERS, ADMINISTRATORS AND OTHER SCHOOL STAFF

Teacher Development

Professional development will be an ongoing and vital part of Lee Montessori PCS's long-term education plan. Our teachers and appropriate staff will participate in wide-ranging professional development to guarantee they are in tune with the school's curriculum and goals at all times. Lee Montessori PCS, through a variety of opportunities both in-house and off campus, will offer professional development in the following areas:

- Montessori pedagogy
- Common Core State Standards
- District of Columbia's standards
- District of Columbia's required assessments
- Formative assessments/Assessment through observation
- Authentic assessment
- Classroom management

- ELL education
- Special Education
- DC Teacher certification (if accepting Title 1 funds)
- Cultural competency
- Montessori Compass (an online record keeping student information system)

Upon opening, Lee Montessori PCS will immediately apply for accreditation through the Association of Montessori Internationale (AMI). The District of Columbia is currently home to only six AMI accredited programs. According to AMI-USA's website:

AMI has established its own high-level standard. Accreditation by the AMI is one benchmark that teachers and parents can use in evaluating a Montessori program... AMI accreditation affirms that an institute or school meets a standard of excellence recognized by educators and Montessorians worldwide. Thus, teachers and parents can rely on it. AMI accreditation is voluntary but rigorous. Only institutes or schools that are full members of AMI are eligible to apply.

For accreditation purposes, Lee Montessori PCS will require all lead teachers to be AMI certified. All appropriate staff should be well versed in the Montessori philosophy; therefore, professional development will be an ongoing and integral part of Lee Montessori PCS's growth. All teachers and appropriate staff will participate in regular professional development. Lee Montessori PCS plans to garner a partnership with the Washington Montessori Institute (WMI) at Loyola University of Maryland. WMI will provide extensive trainings at their campus on Montessori pedagogy, classroom management, Montessori observations and assessments, and ELL and Special Education in the Montessori classroom. WMI will also be the governing body in charge of our AMI accreditation process, through classroom observations, consulting and the recommendation of accreditation to the Association Montessori Internationale United States office.

Administrator Development

Lee Montessori PCS will require all administrators to attend an intensive workshop held by AMI-USA six months prior to the start of the school year. Each administrator of Lee Montessori PCS must understand the vital role s/he will play as head of school, curriculum director, operations manager, etc. The Head of School is responsible for leading teachers, staff, families and students in understanding the mission of the school, as well as the philosophy of Dr. Montessori. Because Lee Montessori PCS will be one united community, we will require all administrators to support the Head of School at all times in this task. During this workshop, the administrators will gain knowledge in the following areas: the foundations of the Montessori philosophy, leading a Montessori community, improving student achievement in a Montessori school, staff motivation and organization, and day to day operations of a Montessori school.

Staff Development

Classroom Assistant Development

As stated, Lee Montessori expects each staff member to be well versed in the Montessori Method. Therefore, we will require and provide professional development for all classroom assistants. Prior to the start of the school year, each classroom aide will attend two-week training through WMI (offered to all Montessori Assistant candidates in the DC and MD regions). This training will provide the fundamentals of Montessori theory and classroom practices. Each assistant will also be

given the skill set he or she needs to successfully aid his or her classroom teacher on a day to day basis.

In addition to formal professional development, Lee Montessori PCS will implement a plan to include weekly collaborative meetings and observations and instruction by the Principal. These weekly meetings will take place each Wednesday afternoon, immediately following early dismissal. During weekly collaborative meetings the teachers will meet with other teachers at their grade level along with the Principal once per week to discuss ideas, concerns, etc. pertinent to the specific lessons being taught to individual children. Each teacher and his/her classroom aide will also meet weekly to discuss and address specific classroom needs.

Each teacher will receive individualized observation and coaching from the Principal weekly over a 12 week time period each year. During the coaching cycle, the Principal will work side by side with the teacher in the classroom during one morning work period per week. A follow up discussion will take place between the two during the teacher’s planning period on the same day. This time affords the opportunity to discuss the strength and weaknesses of the teacher and the classroom environment, any concerns with specific students and to determine the best possible practices the teacher can implement in the classroom.

G. STRUCTURE OF THE SCHOOL DAY AND YEAR

The Lee Montessori PCS 2014-2015 school year will consist of 186 academic days, 5 more days than the current 2012-2013 District of Columbia’s Public Schools calendar. Lee Montessori PCS will also have an extended school day, 9:00am – 4:00pm, providing an additional 30 minutes of instruction per day in comparison to DCPS’s current school day. Therefore, Lee Montessori PCS’s students will receive approximately 65 more hours of instruction per year. The tentative schedule is as follows:

Monday, Tuesday, Thursday, Friday Schedule

7:30 – 8:55am	Early Morning Care and breakfast
8:55 – 9:00am	Transition to classroom
9:00 – 12:00pm	Uninterrupted 3 hour morning block including a morning snack in class
12:00 – 12:05pm	Transition to Recess
12:05 – 12:50pm	Recess
12:50 – 12:55pm	Transition to classroom
12:55 – 1:20pm	Lunch in classroom
1:20 – 1:30pm	Transition to nap (3 and 4 year olds)
1:30 – 3:45pm	Nap/Rest (3 and 4 year olds)
1:30 – 3:05pm	Afternoon work period for children ages 5 and up
3:05 – 3:10pm	Transition to foreign language classes*
3:55 – 4:00pm	Prepare for dismissal
4:00pm	Dismissal
4:00 – 6:00pm	After school care

Wednesday Schedule

7:30 – 8:55am	Early Morning Care and breakfast
8:55 – 9:00am	Transition to classroom
9:00 – 12:00pm	Uninterrupted 3 hour morning block including a morning snack in class

12:00 – 12:05pm	Transition to Recess
12:05 – 12:50pm	Recess
12:50 – 12:55pm	Transition to classroom
12:55 – 1:20pm	Lunch in classroom
1:30 pm	Early Dismissal (Staff PD afternoon)
1:30-6:00 pm	After-school care

*Language classes will be restricted to afternoon time slots only.

Draft School Calendar

August 12-13	Classroom work day
August 14-15	Professional Development
August 18	Classroom work day
August 19	First day of school
September 1	Labor Day
September 15	Parent-Teacher Conferences; 1:00 Dismissal for Students
October 13	Columbus Day
October 27	Professional Development
November 10	Professional Development
November 11	Veterans Day
November 26-28	Thanksgiving Break
December 12	Parent-Teacher Conferences; 1:00 Dismissal for Students
December 20- January 4	Winter Break
January 16	Professional Development
January 19	MLK Day
February 13-15	AMI Refresher Course (PD)
February 16	President's Day
March 6	Parent-Teacher Conferences; 1:00 Dismissal for Students
March 28-April 5	Spring Break
April 16	Emancipation Day
May 4	Professional Development
May 25	Memorial Day
June 18	Parent-Teacher Conferences; 1:00 Dismissal for Students
June 19	Classroom work day
June 22-23	Classroom work day
July 24 – August 17	Summer break/Summer session

August 2014

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31						

September 2014

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January 2015

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April 2015

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May 2015

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June 2015

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July 2015


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26	27	28	29	30	31	

 Classroom work day

 No school for students and teachers

186 Instructional days

 Professional Development for all staff

 Parent-Teacher Conferences; 1:30 Dismissal for students

B. BUSINESS PLAN

1. PLANNING AND ESTABLISHMENT

A. PROFILE OF FOUNDING GROUP

Founding Group (Starred names indicate DC residents)

***Megan Hubbard** is a primary Montessori teacher for DCPS and has taught in her current position for five years. She has a Master's in Education from Loyola College in Maryland and holds her Association Montessori International (AMI) certification from the Washington Montessori Institute. Since she has been teaching in DCPS she has been named a highly effective educator under the Impact rating system, has served as a teacher selector recruiting new talent to the District, and has served as the early childhood department chair for Marshall Elementary. Ms. Hubbard is well versed in Head Start procedures and regulations and the CLASS system for best practices in teaching. She has collaborated with administrators and fellow Montessori teachers to align the Montessori curriculum with DCPS standards for early childhood.

***Austyn Brickler** is a lead teacher at Thurgood Marshall E.S., a Title 1 public school in Washington D.C. She received her Association of Montessori International (AMI) Montessori Primary Certificate from the Washington Montessori Institute and her MEd in Montessori Early Childhood Education at Loyola University. Over the last three years, Ms. Brickler has played a vital role in the District's successful AMI accreditation process. She has been rated highly effective by the current IMPACT evaluation process by DCPS. She is a current volunteer for ProjectFocus, a non-profit organization whose mission is to reduce poverty and provide support to communities in Uganda. Ms. Brickler's passion for Montessori stems from her childhood in Chicago where she attended both private and public Montessori schools from pre-school through the sixth grade.

Chris Pencikowski has spent his career focused on enhancing services critical to improving quality of life in American cities, with a specific focus on closing the achievement gap in America's public schools. Mr. Pencikowski's most recent experience was as the Chief Operating Officer for AppleTree, overseeing the shared administrative services of a high-performing public charter school and research institute. Prior to joining AppleTree, he served as Special Assistant to the Deputy Secretary at the U.S. Department of Education, leading the design and implementation of performance management and operations systems. From 2006-10, Mr. Pencikowski was a Senior Managing Consultant at Public Financial Management, Inc., where he provided management consulting support to cities and school districts to improve financial and operations systems. Mr. Pencikowski began his career as a U.S. Peace Corps volunteer, spent two years working on Capitol Hill, and managed education programs for children with high needs in New Orleans. As part of this work, he has taught in classrooms from preschool through high school. Mr. Pencikowski holds a Masters of Education Leadership from the Broad Center for the Management of School Systems, a Masters of Public Administration from the University of Pennsylvania, and a bachelor's degree from Tulane University, where he focused on early childhood education.

Kelly Smith has extensive experience in charter schools, Head Start, preschool, and day care administration in communities of high poverty. She served as the Head of School for a neighborhood based charter school, Belmont Academy Charter School, in West Philadelphia for 5 years. As the Head of School, she administered the National School Lunch Program, Title I Funding,

Head Start Federal and State Grants, and Child Care Subsidy Contracts, and led the school through its third successful charter renewal. Kelly also has wide experience in the design of assessments aligned to meet Response to Intervention (RTI) and Early Learning Standards. In her previous charter school positions, she was an integral part of the facilities management team. Kelly is currently pursuing a Master's Degree in Education Administration focusing on Principal Preparation in Urban Education. Additionally, Ms. Smith is the Director of Firefly Literacy Fund, a nonprofit that engages in projects and book purchasing to boost student literacy in low-income areas.

***Susan Klinger** is a financial professional with extensive experience in analysis, forecasting, management, planning, and reporting. Mrs. Klinger holds a BA from Radcliffe College/Harvard University and a MBA from Boston University. She currently serves as the Enterprise Model Risk Manager at Freddie Mac where she has worked on the revision of policies and procedures related to model governance. She currently utilizes this governance experience on the finance committee of the Board of Class Acts, a non-profit organization dedicated to bringing the arts to a variety of schools, community centers, and other organizations in the greater DC area. While Ms. Klinger's three children attended DC Public Schools, she served as the Treasurer and Co-President of the Home and School Association (HSA) at Murch Elementary School and later as the Treasurer of the HSA at Deal Junior High School.

***Ed Fisher** is an emerging leader in politics, business, and community development in Washington DC. He currently serves as the Chief of Staff to Ward 7 Councilmember, Yvette Alexander, where he uses his background in legislative and regulatory affairs and experience as a small business owner to encourage economic growth in underserved communities. Mr. Fisher is a graduate of Hampton University's School of Business and The Catholic University of America's School of Law. Mr. Fisher currently serves on the board of the Ward 7 Democrats and the DC Promise Neighborhood Initiative and is an active volunteer with The Lifting as We Climb Foundation Inc., where he mentors and tutors African American young men. Mr. Fisher is the father of two young boys who have been students in Montessori classes in the public school system and currently attend a DC charter school.

***Dominique Fortune** has extensive experience managing people, processes, and technologies around business development for leading consulting and professional service government contractors. In her current position, Ms. Fortune leads federal business development efforts for US Investigative Services (USIS). In 2011, she started a scholarship fund for DC youth that she currently manages through Lifting as We Climb, a local non-profit organization focused on mentoring young at-risk, inner city children. She brings to Lee Montessori her ability to build relationships both in a corporate environment and within the community, along with her experience fundraising for a local non-profit.

Lori Smedley serves as the Senior Vice President of Institutional Advancement at the Washington Center for Internships. She has extensive experience in major gifts and a proven track record in securing gifts from \$10,000 to \$10,000,000. Previously, Ms. Smedley worked in fundraising and corporate relations for the Global Alliance for Vaccines and Immunizations Campaigns, The United States Holocaust Memorial Museum, the Community Women's Education Project, and the Philadelphia Mural Arts Program. In addition to her experience and drive in securing major gifts for various nonprofits, Lori has two daughters enrolled in Montessori programs.

Clara Smith has a J.D. from Washington and Lee School of Law. Her work experience includes a clerkship with the 19th Judicial Circuit in Fairfax, Virginia, and private practice in Douglas,

Wyoming, as well as substitute teaching in Fairfax County. As the parent of a young adult with Down syndrome, she has experience from the parent perspective with many aspects of special education. Ms. Smith served as a PTA liaison to the Fairfax County Advisory Board for Students with Disabilities, and on the Parent Advisory Board of the Options program for students with disabilities at Paul VI High School. Ms. Smith has also served as President of the Board of three non-profit organizations: a daycare center, a cooperative preschool, and a high school athletic booster club. Currently, she is a volunteer with Court Appointed Special Advocates (CASA), advocating on behalf of abused and neglected children in the Fairfax Juvenile and Domestic Relations court.

***Abbey Hairston, Esq.** has 30 years' experience representing public school districts including Palm Beach County Florida, Los Angeles United School District, Baltimore County Public School and District of Columbia Public Schools. She currently represents the Board of Education for Prince George's County and the National Children's Center amongst other educational entities. Her unique experience as both in-house and outside counsel for school systems in urban school districts makes her an uncommonly strong legal expert for a charter school founding group. In addition, Ms. Hairston is well versed in federal and state requirements for the operations of charter schools.

***Beverly O'Bryant** is the Dean of the School of Professional Studies at Coppin State University. Dr. O'Bryant retired as an educational administrator from the District of Columbia Public Schools after 33 years of service. Her last position with the DC Public Schools was Director of the Community Service/Service Learning Programs and as a Commissioner for the DC Commission on National and Community Service. She has appeared on ABC's Good Morning America, the CBS Morning Show, and a PBS Special on New Visions for Guidance, and participated in CBS's Project Education Forum. She was also an adjunct professor at Trinity College in Washington DC and Mississippi State University. She brings extensive board membership experience and community activism to the founding group.

Willie Davis is the current president of the entrepreneurial development firm Davis Executive Associates and brings significant governing board experience as well as a history of promoting community activism in DC to the founding board of Lee Montessori. For 30 years prior to the establishment of Davis Executive Associates, Mr. Davis applied his entrepreneurial talents to the creation of Birch & Davis Holdings, Inc., a management consulting firm. Throughout his career he has worked in settings ranging from large multinational corporations to small "storefront" operations in urban communities. Mr. Davis has recently served on the Board of Directors of the Montgomery County, Maryland Boys & Girls Club, The Shepherds Table of Montgomery County, Maryland, the Washington Tennis and Education Foundation, and the International Hospital for Children.

***Roland Kidd** currently sits on the Board of Kidd International Social Services (KISS) and is the lead fundraiser for Face Forward, a non-profit for at-risk teenage youths. Mr. Kidd has a Bachelor's Degree in Business Administration from Morgan State and is currently working on his MBA at the University of Maryland. He has worked as a consultant for various nonprofit organizations and is passionate about using his background and skills as a means of empowering children and improving education in the District of Columbia. Mr. Kidd was introduced to the Montessori pedagogy when his daughter attended three years of primary Montessori in the District of Columbia Public School System and he is committed to bring that experience to more DC schoolchildren.

Marimba Johnson Bright is a speech pathologist with DCPS and has over 12 years of experience in education. She has worked extensively with special populations, at-risk students, and students with diverse cultural backgrounds. Ms. Bright has a strong understanding of the educational

challenges within urban communities. She is a very involved parent of her 5 year-old daughter who is in her last year of a Primary Montessori program with DCPS. Through observing her daughter's experiences, Ms. Bright has become extremely passionate about Montessori education and the academic advantages it provides young children in the DC area.

B. PLANNING PROCESS

Parent and Community Involvement

The idea for Lee Montessori was born from a discussion among current District of Columbia Montessori teachers and parents in 2010 after hearing from many parents that they wanted to continue their children's Montessori education but did not have the financial means for private schooling and were daunted by the waitlists at the very limited elementary programs in the city. Through their work at a Title 1 school in Ward 5 that offered primary Montessori, the teachers and parents on the founding board were, and continue to be, passionate about bringing Montessori in the form of public education to more of the District's youngest learners and to the areas of the city where strong early childhood programming is so crucial to the future educational success of its children.

Recognizing that their expertise was primarily in AMI curriculum and accreditation standards, the initial founding members reached out to members of the community with strong leadership skills in the areas of education law, business development, board governance, fundraising, educational administration, and community activism to expand the founding group. In addition to their varied skills, many of the founding group members have a personal connection and dedication to the Montessori movement. Moving forward we plan to utilize the various connections that our current founding group has to reach out and recruit additional members who will continue to broaden the backgrounds and perspectives of the Lee Montessori founding board. Specifically we will be looking for members with backgrounds in real estate, governance, and non-profit management. As the founding group prepares to transition into a governing board we will contact Charter Board Partners in an effort to establish, recruit, and retain board members with a commitment to our school's mission.

Lee Montessori PCS will continue our outreach through informational meetings with members of the community. We plan to use these community meetings not only to spread the word about our planned efforts, but as a means to receive feedback from parents and other stakeholders about what they are looking for in a local school. The community partnerships we have secured thus far have generated interest in Lee Montessori PCS in both the DC community and the Montessori community as a whole and we will continue to utilize those partnerships to strengthen support for the school.

C. CORPORATE STRUCTURE AND NONPROFIT STATUS OF THE SCHOOL

Process and Timeline of Nonprofit Status

The Articles of Incorporation have been filed with the District of Columbia. The Certificate of Incorporation was issued on January 11, 2013.

The application for 501(c)(3) status was filed with the IRS on 2/28/13

Lee Montessori PCS will file for DC Tax Exemption once it is chartered and has received the IRS exemption.

2. GOVERNANCE AND MANAGEMENT

A. BOARD OF TRUSTEES

The Board of Trustees of Lee Montessori PCS is responsible for ensuring the school continuously meets the mission stated in the Charter. The Board will provide strategic planning, financial management, and leadership and will have ultimate responsibility for overseeing the performance of the Head of School and the performance of the school. The founding board comprises a small group of passionate supporters driven by a vision of educational excellence, academic achievement and bringing a lifetime of opportunity to students in the District of Columbia. This founding group has actively engaged in the initial planning and formation of the school, including applying for its charter, filing for incorporation, applying for its 501(c)(3) status, and planning for the creation of a Board of Trustees. Once Lee Montessori PCS's charter is approved, many members of the founding group will become members of the school's Board of Trustees, along with new recruits.

Board Composition and Meetings

The Board of Trustees will consist of an odd number with no fewer than nine members and no more than fifteen. A majority of the Board members will be residents of the District of Columbia, and at all times there will be two parents of current students seated on the Board. In accordance with the bylaws, the Board will meet a minimum of six times per year and will hold an annual meeting in May to elect Officers and Trustees.

Selection Process

Once the charter is granted, nine members of the Founding Board will comprise the initial Board of trustees. Those members are Dominique Fortune, Willie Davis, Roland Kidd, Ed Fisher, Susan Klinger, Marimba Bright-Johnson, Beverly O'Bryant, Lori Smedley, and Kelly Smith. To ensure continuity of leadership, the terms of the initial board members will be staggered. Four members will serve for three years, three members will serve for two years, and two members will serve one year terms. Thereafter, any person elected to the board will serve a three year term. No Trustee will serve more than two consecutive three year terms.

The first committee formed by the Board of Trustees will be Governance Committee charged with recruiting and recommending new Board members.

Within two months of the opening of the school, two parents of currently enrolled students will be elected to the Board. The President of the Parent Advisory Committee will fill one of these two seats, and the Parent Advisory Committee will work with the Governance committee to nominate a parent for the other seat. Lee Montessori PCS plans to have the Board of Trustees fully seated by December 2014.

The Governance Committee, in consultation with other Board members, the Head of School, the Parent Advisory Committee, Charter Board partners, community partners and other interested parties, will work to identify and recruit potential board members who meet the following qualifications:

1. A steadfast commitment to meeting the educational standards of the Association Montessori Internationale (AMI) and ensuring that all students are nurtured academically, socially, and emotionally.
2. Personal beliefs and professional skillsets that will support effective governance including:
 - a. Commitment to the importance of providing quality public education for children of all races and socio-economic backgrounds;
 - b. Understanding of the Board's accountability for acting as an effective and vigilant steward of public funds;
 - c. Ability to assess the effectiveness of the Head of School's educational and fiscal management of the school and a willingness to replace the Head of School if necessary.
 - d. Commitment to keep the needs of the community in mind at all times and to positively represent the school to the community;
 - e. Experience in education, business, management, finance, law, governance, fundraising, or real estate.
3. Willingness to accept and support the decisions made in accordance with the by-laws;
4. A commitment to giving time, energy, and resources to support and strengthen the school.

Succession Process

Board Succession

A Trustee may be removed from the Board, with or without cause, by a majority vote of the Board of Trustees in accordance with the bylaws. A Trustee can resign from the Board at any time by giving written notice to the Chair. Any vacancy on the Board can be filled by a majority vote of the Trustees in accordance with the by-laws. Should the office of Chair become vacant, the Vice-Chair will become Chair for the unexpired portion of the term. Should the office of Vice-Chair, Secretary or Treasurer become vacant, the chair shall appoint an interim officer to serve until the next meeting of the Board. The Governance committee will generally look to the standing committees for nominees to fill vacant offices, i.e. look to the Finance Committee to fill a vacancy in the office Treasurer.

Staff Succession

The Board of Trustees will develop a succession plan for the unexpected departure of key management staff. In the event the position of Head of School should be vacant, the Operations Manager could serve as interim Head of School while a search is conducted for a new Head of School. Should the position of Operations Manager become vacant, the Head of School could

temporarily assume some of those duties until a replacement is hired. The Head of School will also rely more heavily on the school's outsourced financial management consultants during this interim.

Committees

Once established, the Board of Trustees will form standing committees, including Executive, Governance, Finance, Student Achievement and Accountability, and Development. This structure will ensure that the Board is well positioned to provide the strategic direction of the school and hold itself accountable for achieving the goals set out in its charter by reviewing all aspects of performance and identifying where potential areas of growth and/or risk may exist.

In accordance with the by-laws, the Governance Committee will: 1) evaluate the qualifications of candidates and present a selection of the best candidates for vacant positions on the Board of Trustees; 2) present a selection of nominees for vacant Officer positions on the Board of Trustees; 3) recommend candidates to the Board for vacancies that may arise outside of the regular nomination time period; 4) provide ongoing orientation to Trustees; and 5) oversee the assessment of current Trustees to ensure optimal performance.

The Executive Committee, chaired by the Board Chair, will act on behalf of the board on urgent issues when the full board is not able to meet, and will lead the performance evaluation process for the Head of School.

The Finance Committee will be responsible for oversight of school finances, ensuring accurate and comprehensive financial reporting to the board, and raise strategic financial issues for board discussion. The committee will review and approve financial statements and financial policies, recommend approval of the budget, and direct the financial audit process.

The Student Achievement and Accountability Committee will be responsible for analyzing and evaluating student achievement and school performance. It will oversee the school's accountability plan and compliance with all applicable state and local agencies. The committee will also ensure the maintenance of AMI certification.

The Development Committee will lead the Board's involvement in fundraising and marketing to ensure long-term viability of the school.

Standing committees will meet as necessary and submit regular reports to the Board of Trustees.

Officers

The Board of Trustees will have four officer positions: Chair, Vice-Chair, Secretary, and Treasurer. Nominees for these positions will be put forth by the Governance Committee and will be voted on and approved by the full Board. These officers will be regularly evaluated by the Governance Committee and are allowed to serve two renewable and consecutive one-year terms. Further discussion of the responsibilities of officers can be found in the proposed by-laws.

In accepting their position as a member of the Board of Trustees, each Board member is acknowledging their commitment to stay informed and participate in the work of the Board as a whole and in the active work of the standing committees. One of the key responsibilities of the Board is to monitor the performance of the school leadership, namely the Head of School, and hold him or her responsible for achieving the goals set forth in the charter, insuring high standards of

learning, and continuously marketing the proposed school. Further, while it is the Head of School's role to provide the Board with the information necessary to determine whether the school is meeting its goals, holding students to high learning outcomes, and ensuring that there is a demand for the proposed school, it is the Board's responsibility to ensure that the Head of School is held accountable for effectively communicating performance to the Board. In particular, the Head of School will be responsible for communicating with the board:

- Monthly updates on the performance relevant to each operational committee (Finance, Student Achievement and Accountability, and Fundraising/Development)
- Regular communications of any day-to-day issues as required (e.g., reporting procurements in accordance with PCSB requirements)
- Annual reporting, including annual financial statements and 990s, annual performance reports, etc.

The Board is responsible for communicating any additional information needed and for incorporating these needs into the formal evaluations of the Head of School by the Executive Committee of the Board.

Monitoring of Student Data

Lee Montessori will use data to ensure that students are meeting or exceeding performance targets. In particular, school leaders will have student information systems in place that monitor leading indicators such as attendance (Montessori Compass, see section C.4.a) as well as student achievement data (e.g., the Teaching Strategies GOLD assessment). It is a responsibility of the Board to continuously monitor this data to insure that the academic and non academic goals specified in the charter are being met. It will be the responsibility of the Head of School to present this information to the Board as a whole as well as to the Student Achievement and Accountability committee. In particular, the Head of School will, on a monthly basis, provide the Board with a dashboard report on key performance indicators, including performance on relevant assessments, attendance, and discipline. Following any key assessments (e.g., DCCAS), the Head of School, with the support of the Principal, will present a detailed report on student performance and any action steps required for any identified deficiencies.

If need be, the Board will receive professional development on interpreting student data and how the Head of School should utilize that data to make school-based decisions.

Annual Evaluations

The Board of Trustees will be responsible for the recruitment, hiring, and retention of the Head of School. As such, the Board will conduct an annual performance evaluation of the Head of School using a rubric developed by the Board during the planning year. Areas of evaluation will include, but are not limited to, academic growth of students, fiscal responsibility in the day-to-day operations of the school, and the meeting of student enrollment and retention goals.

Board's Relationship to Teachers and Administrators

As mentioned previously, the Board will hire and supervise the Head of School to ensure that he or she is executing the mission of the school according to its charter and meeting or exceeding performance levels. The Head of School is responsible for the day-to-day decision-making related to the school-level operations. Under the Head of School's direction, school-level staff will work

closely with the Board's standing committees; for example the Operations Manager will be working closely with the Board Treasurer and the Finance Committee.

Board's Relationship to Parents

All parents will be welcomed and encouraged to nominate themselves or other parents to serve on the Board in order to ensure an expansive and diverse group of parents has the opportunity to serve on the Board. Lee Montessori PCS values and will solicit the input of its entire parent population. Representatives from the Parent Advisory Committee will meet regularly with both the Head of School and members of the Board. The Board of Trustees will also serve as the final appeal for parents who are dissatisfied from a school-level decision.

Board's Relationship to Students

As observation of the students and their work is one of the key tenets of the Montessori philosophy, members of the Board of Trustees will be expected to visit and observe classes on a regular basis. Board members will also be invited to special events hosted at or by the school. Board members will also be invited to share with groups of students a special interest or skill they might have, such as gardening or arts and crafts.

Note: Provide Board of Trustees' job description and performance expectations in Section I of the application.

Note: PCSB reserves the right to conduct background checks (AAA Credit Release) on the Board of Trustees for those applications that are granted full approval or approval with conditions.

B. RULES AND POLICIES

Board of Trustees – Powers and Duties

Duties of Board Members

Every member of the Board of Trustees shall have the duty of care, the duty of loyalty and the duty of obedience to Lee Montessori PCS. The duty of care requires members to use their best judgment and apply the care of an ordinarily prudent person. The duty of care is demonstrated by regular and active attendance at board and committee meetings, remaining well-informed about the school's activities, using independent and best judgment, and maintaining a thorough knowledge of all important issues and how they are being addressed. The duty of loyalty requires members to give undivided allegiance to the school when making decisions affecting the school. The duty of loyalty is carried out by disclosing any conflict or potential conflict of interest and by strictly adhering to the Lee Montessori Conflict of Interest policy. The duty of loyalty prohibits any board member from any endeavor to profit personally from his or her position on the Board. The duty of obedience requires members to comply with all applicable federal, state, and local laws and to adhere to the bylaws of Lee Montessori PCS. The duty of obedience is demonstrated by remaining faithful to the mission and philosophy of the school, monitoring the school's compliance with regulatory and reporting requirements, ensuring the decisions of the Board are consistent with the mission, and adhering to the confidentiality policy of Lee Montessori PCS.

Powers and Responsibilities of the Board

The Board of Trustees is the governing body of the school and as such its responsibilities include, but are not limited to, setting the mission of the school, providing strategic direction, approving the budget and overseeing the financial stability of the school, and approving and implementing the Policies and Procedures manual. The Board shall provide strong leadership for the school by hiring and continually evaluating the Head of School, terminating employment when it is in the best interest of the school, and assessing and developing the Board's own performance. We are conscious of and seek to respect the distinction between the Board's role in governing the school and the role of the Head of School in managing the school. As stated above, the Board will focus primarily on strategic direction, financial management and leadership.

Strategic Direction- The Board is responsible for setting short term and long term planning goals including meeting student enrollment targets, achieving and maintaining AMI accreditation, and achieving and maintaining performance goals of the Performance Management Framework (PMF).

Financial management- The Board will oversee the financial stability of the school by reviewing and approving the annual budget, monitoring monthly financial reports, hiring the audit firm to conduct the annual financial audit, and reviewing/approving the Form 990 prior to filing it with the IRS.

Leadership- The Board will recruit, hire, evaluate and if necessary replace the Head of School as well as giving him or her the support and direction needed to carry out the mission and goals of the school. The Board is responsible for assessing its collective performance and for participating in regular board development to maintain strong leadership of the school.

Board of Trustees – Conflicts of Interest

The Board of Trustees has the standard and duty of care to protect the interests of Lee Montessori PCS when entering into a transaction or arrangement that might benefit the private interest of a member of the Board or might result in a possible excess benefit transaction. The Board is bound by applicable state and federal laws governing conflict of interest applicable to nonprofit organizations. The Board has a formal Conflict of Interest policy, which is attached to this application and can also be found in Article VII of the bylaws.

Under this policy, each member of the Board annually signs a statement disclosing any conflicts or potential conflicts and affirming that he/she

- a. Has received a copy of the conflict of interest policy;
- b. Has read and understands the policy;
- c. Agrees to comply with the policy; and
- d. Understands that Lee Montessori PCS is a charitable organization and in order to maintain its federal tax exemption must engage primarily in activities that accomplish one or more of its tax exempt purposes.

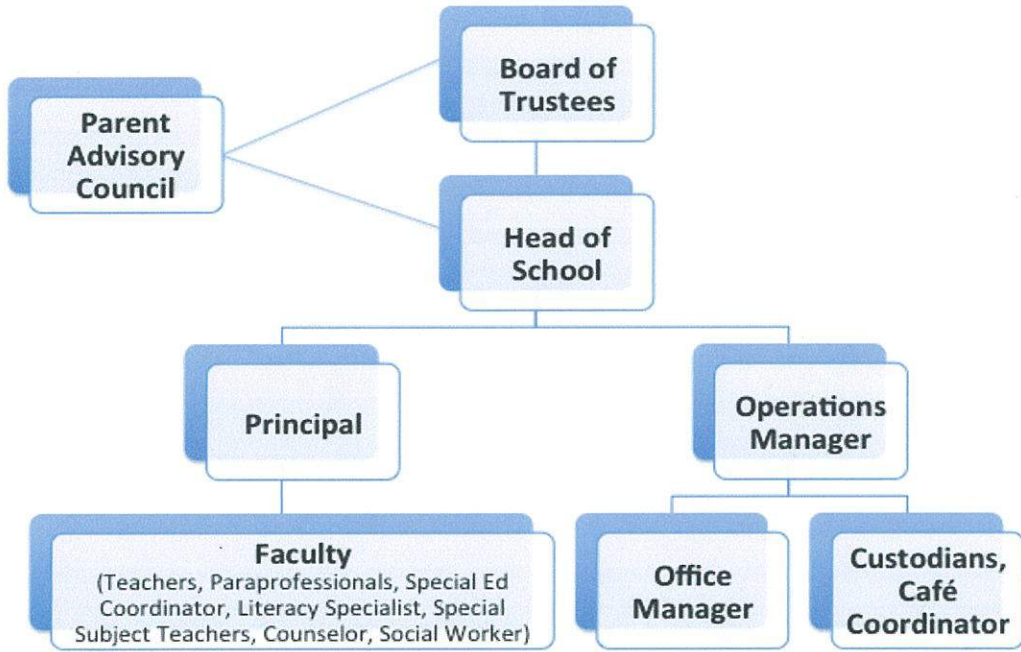
These forms will be kept on file at the school.

In accordance with the bylaws, if a member of the Board discloses a conflict of interest, the Board will review it in that member's absence or by a Conflicts Committee, should one be appointed. If the

Board determines that a conflict of interest exists, the member disclosing the conflict shall recuse himself from voting on the matter at hand.

C. ADMINISTRATIVE STRUCTURE

Administrative Structure



The administrative staff of Lee Montessori PCS comprises the Head of School, the Principal, and the Operations Manager. The Head of School will oversee all day to day operations of the school and reports to the Board of Trustees. The Principal is the instructional leader in the school and reports directly to the Head of School. Specific responsibilities of the Principal include curriculum implementation, overseeing the teaching staff, managing all mandated assessment, and acting as an instructional coach to the teaching staff. Also reporting to the Head of School is the Operations Manager who is responsible for overseeing day to day items like facilities maintenance, IT systems, and procurement. The Office Manager reports directly to the Operations Manager. Teaching staff, including the before and after care providers, report to the Principal, while additional staff, such as the custodians and the café coordinator, report to the Operations Manager.

<p>Head of School</p>	<ul style="list-style-type: none"> ● Nurture, support, and strengthen the school’s mission ● Communicate with the Board of Trustees and provide input and timely and relevant information to the Board about the operations of the school ● Build, lead, and maintain a Montessori learning community ● Ensure an overall management culture of openness, collaboration, and high expectations while ensuring the overall administrative systems are developed and implemented ● Support the Board in securing adequate resources through fundraising and development ● Effectively communicate with community stakeholders and all parents and the Parent Advisory Council ● Create a nurturing, safe, and peaceful learning environment
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	<ul style="list-style-type: none"> ● Oversee finances
Principal	<ul style="list-style-type: none"> ● Guide the development and implementation of a curriculum that supports the Montessori model and philosophy ● Align Montessori lessons with the Common Core Standards ● Manage the assessment processes and identifies strategies to improve assessment results ● Support teachers and empower them to contribute to the success of the school and implementation of Montessori practices ● Ensure that the curriculum complies with the AMI standards and the Office of the State Superintendent of Education ● Act as an instructional coach with teachers and other educational staff to implement the curriculum and solicit input and feedback
Operations Manager	<ul style="list-style-type: none"> ● Oversee facilities systems ● Manage IT systems or IT staff if applicable ● Manage ordering of all supplies and Montessori materials ● Prepare financial reports and compliance reports and share regularly with the Head of School and the Board of Trustees

The administration of Lee Montessori PCS will have an open door policy that encourages suggestions, and constructive criticism is welcome from parents, teachers, and students. Teachers will have the opportunity to provide anonymous feedback after all professional development events. In the first operational year, the Head of School and the Principal will set a schedule of staff meetings where all staff, teaching and non-teaching, can bring their concerns to the Head of School, to be passed along to the Board of Trustees as necessary. Parents will have input through the Parent Advisory Council as well at the two parent representatives on the Board of Trustees. In addition, parents may always bring concerns before the Head of School and the Board. At the time that the school is serving students through 6th grade, Lee Montessori PCS will form a Student Advisory Council to bring another form of input to the Board.

3. FINANCE

A. ANTICIPATED SOURCES OF FUNDS

Anticipated Per Pupil Allocation

We anticipate receiving the following funds during our planning and first two operational years:

	Planning Year	Year 1	Year 2
Student Enrollment			
Preschool		30	30
Pre-Kindergarten		15	30
Kindergarten		15	15
First Grade		10	18
Second Grade		0	10
Total Number of Students		70	103
% of students receiving special education services		5%	5%
% of students who are English		10%	10%

	Planning Year	Year 1	Year 2
Language Learners (ELLs)			
Per Pupil Allocations			
UPSFF		\$919,919	\$1,366,750
Facilities Allowance		\$210,000	\$309,000
Per Pupil Revenue			
Total Per Pupil Allocation		\$846,731	\$1,238,781
Total Facilities Allowance		\$210,000	\$309,000
Total Special Education Funding		\$43,286	\$55,731
Total ELL Funding		\$29,901	\$43,998
Total Summer School funding		\$0	\$28,240
Total Per Pupil Charter Payments		\$1,129,919	\$1,675,750
Other Public Revenue			
National School Lunch Program		\$20,659	\$31,899
Healthy Schools Act Program		\$1,502	\$2,349
E-Rate Program		\$0	\$5,253
Total Other Public Revenue	\$0	\$22,161	\$39,501

Additional Expected Resources

Federal Entitlements			
Title V-b Grant	\$205,000	\$266,948	\$272,811

Private Revenue			
Grants and Donations	\$10,000	\$10,000	\$10,000
Activity Fees		\$77,955	\$116,885
Interest Income		\$1,870	\$2,920
Total Private Revenue	\$10,000	\$89,825	\$129,805
Total Income	\$215,000	\$1,508,853	\$2,117,867

In the event that our income projections change dramatically due to lower than expected per pupil allocation, or should the payment be delayed, we will consider the following options:

- We will look at classroom composition and size and maximize each classroom allowing us to have fewer staff members.
- We will examine our staffing model and see if filling certain positions can be delayed or eliminated without impacting the core instructional staff, therefore looking at non-teaching staff first.
- Lee Montessori Public Charter School will aim to establish a reserve fund during the planning year through private donations. We will also follow conservative budgeting practices with the aim of generating small operating surpluses that will build the cash position of the school and help us weather unexpected shocks.
- We will access our established line of credit to help us weather any resulting short-term cash flow challenges.

Our current five-year budget was designed with the priorities of high quality programming and financial sustainability in mind. This includes hiring additional staff each year to meet the student enrollment goal as the grades served expands through upper elementary. As our student population grows, so will our student needs, and our budget reflects the addition of staff members for

expanded educational programming (i.e. additional special subject teachers) and student and family outreach (i.e. hiring of a Dean of Students/Family Outreach Coordinator in Year 2.)

We have planned for a minimum of 5% cash surplus in the first five years of operations to build up a reserve to protect against unforeseen costs and to prepare ourselves to finance the move to a permanent facility in a future year.

B. PLANNED FUNDRAISING EFFORTS

Lee Montessori will embark on private sector fundraising through the traditional channels— foundation, corporate, and individual support—and will also employ an innovative, grass-roots fundraising strategy that will incorporate the vast body of strong supporters of Montessori education in the DC metro area.

Montessori educators, parents, and graduates are very often dedicated to the experiential and self-directed Montessori method, and believe that it has had a huge impact on the lives of their pupils, their children, and even themselves. The Lee Montessori team will seek to partner with the greater community of Montessori schools and supporters in the DC metro area for fundraising purposes. Almost all Montessori preschools and elementary schools have annual community service plans—the Lee Montessori team would contact private Montessori schools in Maryland, Virginia, and DC, asking them to participate in a campaign to provide Lee Montessori with funds needed to purchase the Montessori supplies and tools that make this type of education possible.

The Lee Montessori team will develop the campaign during January through March 2013 (including the messaging, requests, and a toolkit that would provide schools with a turnkey operation for ease of implementation). The team will approach schools in the DC metro area in the Spring and Summer of 2013, and would ask schools willing to participate to launch the campaign when they start school in the Fall of 2013. To further cement the relationship between the funding schools and Lee Montessori, Lee Montessori would like to host a “Montessori Day” activity for students, parents, and educators from the participating schools.

This grassroots campaign will provide an excellent indicator of interest and support from the private sector as we begin to approach corporations and foundations for funding. In the coming months, the Lee Montessori fundraising team will develop a comprehensive fundraising plan, which will rely both on the community connections of the founding group and the strength of the funding community in the DC area for K-3 educational programs. We will research the foundation landscape, and will approach at least 20 corporate and private foundations for initial conversations before August 2013. A sampling of foundations with potential interest include:

- The Morris and Gwendolyn Cafritz Foundation
- Lumina Foundation
- Bill and Melinda Gates Foundation
- Walton Family Foundation
- William G. McGowan Foundation
- Capital One Foundation
- CityBridge Foundation

Planning Year Funds

During the planning year we are projecting \$215,000 in revenues - \$205K of which is from Title V-b Planning & Program Design funding and \$10,000 in private grants and donations. Most of the expense items are based on comparable data from other D.C. charter school planning year budgets and EdOps' experience.

We understand that as a new charter school with minimal reserves, our cash flow will be limited during the Planning Year. To help with this, the school will seek to establish a \$25,000 line of credit with a bank to help cover the low-cash periods during the year (and into Operating Year 1, as well).

Upon charter approval, the Lee Montessori PCS will apply for a start-up grant from the Walton Family Foundation, a strong supporter of the charter movement in D.C. that has provided such funds to other new charters in recent years. Based on this recent history, the typical funding amount is \$250,000. If Lee Montessori can secure this amount from Walton, then it will move forward and/or increase certain key expenditures and otherwise adjust its Planning Year budget accordingly. However, in order to maintain the conservative budget framework in this application, we will not assume receipt of this funding.

C. FINANCIAL MANAGEMENT AND ACCOUNTING

Financial Management and Accounting Procedures

The Head of School, the Operations Manager, and the finance committee of the Board of Trustees will collaborate to establish financial policies and accounting procedures that will ensure transparency and accountability. All financial records will be maintained on an accrual basis. After a charter is received, the Board of Trustees will use the Public Charter School Board's Fiscal Policy Handbook as a resource for creating Lee Montessori PCS's Fiscal Policy manual, which will be the basis for all financial management within the school. All policies and procedures will be designed and maintained in accordance with generally accepted accounting principles as defined by the American Institute of Certified Public Accountants. We have collaborated with EdOps to develop initial financial management and accounting procedures and will explore a continuation of their services for our financial management needs including, but not limited to, budgeting, accounting, cash flow projecting, financial reporting, and compliance support.

Cash Flow Management Plan

As a new charter school with limited reserves, our cash flow will be limited during the Planning Year. As previously stated, once a charter is granted, Lee Montessori PCS will immediately seek to establish a line of credit with a local bank to help cover the low cash periods into Operating Year 1. As we begin to build bank account balances, the Operations Manager, in conjunction with EdOps or a similar entity, will work to actively manage our cash flow projections, adjusting expenses and revenues as necessary. The Operations Manager will be responsible for running monthly cash flow reports that will be shared with the Finance Committee on a regular schedule. In addition, to offset shortages that may occur due to the quarterly distribution of per pupil allowances, the Operations Manager and Head of School will seek to negotiate payments with our vendors in such a way as to align with our cash flow.

D. CIVIL LIABILITY AND INSURANCE

Insurance Coverage

As soon as a charter is granted, Lee Montessori PCS will consult with our legal counsel and an insurance broker to obtain an insurance policy that will meet or exceed the requirements outlined by the PCSB:

General Liability	\$1 million per occurrence; \$2 million aggregate
Directors and Officers Liability	\$1 million
Educators Legal Liability	\$1 million
Umbrella	\$3 million
Property/Lease Insurance	100% of replacement cost
Boiler and Machinery Insurance	\$1 million
Auto Liability	\$1 million
Workers Compensation	As required by law

E. PROVISION FOR AUDIT

Audit Provisions

The Board of Trustees will contract an external auditing firm from among the PSCB’s list of approved auditors to conduct a full audit of Lee Montessori PCS’s finances on an annual basis. Lee Montessori PCS agrees to provide all necessary financial information to the auditor in a timely fashion and to submit a copy of the completed audits to the PCSB by their published deadlines.

4. FACILITIES

A. IDENTIFICATION OF A SITE

Lee Montessori PCS Site Identification and Acquisition Timetable

Lee Montessori would like to locate in an area of the city that will make it accessible to the highest numbers of children in need. With that broad goal in mind, we are focusing on Ward 5 and Ward 7 for several reasons:

- The IFF report discussed previously in this application shows that the demand for performing seats in these Wards greatly exceeds the supply, particularly in our target population of K-5;
- The demand for quality Montessori programs is not being met in these Wards. With the closing of DCPS school Marshall Elementary in June 2013, there will be no AMI accredited Montessori program in Ward 5. There is 1 DCPS AMI accredited Montessori program in Ward 7 (further, Nalle Elementary is not AMI accredited and is also a Tier 4 school, per the IFF Report); and

- Two of the founding board members currently teach Montessori in Ward 5 and have close connections between the neighborhood and its residents. They have first-hand knowledge of the desire of Ward 5 families to have a quality Montessori program.

Interim Facility

It is very difficult to find suitable, affordable buildings for a start-up school. Therefore Lee Montessori is continuing to research a wide array of options including incubator sites, co-location with or subletting from existing charters or DCPS, and utilizing a commercial real estate broker.

We are working with Tom Porter at Building Hope to identify an appropriate incubator site in order to conserve resources and ease the start-up process. He has provided a letter of support from Building Hope that is attached to the application. Building Hope currently has incubator sites in Wards 1, 7 and B. There are no incubator sites available in Ward 5 at this time, but we are accessing various community resources to search for a possible facility in Ward 5.

Lee Montessori understands the movement of schools from one year to the next within the incubator system and the resultant uncertainty as to what space will be available in our first year of operation. Consequently we are open to a wide possibility of locations for our initial years. Building Hope is also actively pursuing recently closed DCPS schools and schools that are slated to close this year as possible incubator sites. There are 5 schools closing in Wards 5 and 7, and we will be working closely with Building Hope in this pursuit.

In the short-term, Lee Montessori is looking for a facility that can accommodate up to 150 students, slightly more than our projected enrollment for year 3. The facility should have approximately 100 square feet per pupil or 15,000 square feet, but size alone will not be the determining factor. We will also be considering affordability, accessibility to public transportation, sufficient common areas for staff and students, appropriate access to outdoor space, and the ability to occupy without significant renovations.

Sites visited:

3029 14th St., NW- a Building Hope incubator facility currently occupied by D.C. Bilingual PCS. This facility has 12,500 square feet and can accommodate 190 students. It is ADA compliant and has 6 classrooms, multi-purpose space, office space, nurse's office, teachers' room, and a warming kitchen.

100 41st St., NE- a former DCPS building that is now a Building Hope incubator facility occupied by D.C. Preparatory Academy PCS. This facility has 70,900 square feet and can accommodate 600 students.

90B Wahler Place SE- a former DCPS building that is a Building Hope incubator facility currently occupied by Achievement Preparatory Academy. The facility has 54,800 square feet and can accommodate 500 students. Building Hope has long range plans for further renovation.

1800 Perry St. NE – a former DCPS building that is now home to Perry Street Prep PCS. Building Hope has contingent plans to renovate an annex there for use as an incubator facility.

Permanent Facility

Lee Montessori will continue to work with Building Hope, Cassidy Turley Real Estate Services, and other advisors to identify a permanent site. This could include co-location with another school, renovating an existing building or developing a new facility. James A. Dyck, AIA, LEED SP, a leading authority on Montessori school design and sustainable building practices, has agreed to consult with us as we develop plans for a permanent facility. We are also consulting with a local bank regarding financing.

Timeline for Lee Montessori PCS Facilities	
Interim Site Search	Ongoing Through May 2014
Lease negotiation and finalization	June 2014
Interim space occupancy	July 2014
Permanent Site	Immediate and Ongoing
MOU for lease or purchase agreement	September 2016
Renovation/construction plans completed	January 2017
Lease or purchase agreement finalized	January 2017
Construction completed/occupancy	July 2018

B. SITE RENOVATION

N/A

C. FINANCING PLANS FOR FACILITIES

Plans to Finance the Facility

Lee Montessori plans to lease facilities for the first three to five years. The ideal situation would be to locate in a Building Hope incubator site because the rent is based on the number of students enrolled rather than market value of the square footage. Incubator rents include all maintenance and utility costs (except phone and internet), and Building Hope allows schools to retain 20% of the per student facilities allowance. Our budget projections show that with this arrangement Lee Montessori could have as much as \$780,000 saved towards obtaining a permanent facility by the end of year three of operations.

If it is not feasible to locate in an incubator facility, Lee Montessori will adjust its budget projections, concentrate on smaller affordable locations initially, and utilize the full facilities allowance.

Once we have identified a permanent location, we will be working with Building Hope and OSSE on financing and credit enhancement. We will also actively seek grants to assist in acquisition and/or renovations

D. BUILDING MAINTENANCE

In the initial years, Lee Montessori will strive to negotiate leases that include building maintenance in the lease, such as in the incubator program. When it becomes necessary, we will contract with an

appropriate firm through a competitive bid process for all maintenance needs. In addition, the Board of Trustees will appoint a facilities committee to work with professionals to develop and maintain a checklist to ensure all applicable standards and codes are continuously met.

5. RECRUITING AND MARKETING

A. OUTREACH TO THE COMMUNITY

Montessori schools strive for a strong sense of community within their walls. Lee Montessori Public Charter School will create a strong school community and extend our efforts beyond our walls to partner with surrounding neighborhoods. We recognize that many families are unfamiliar with Montessori education and its success over the last 100 years as an excellent, empirically-validated alternative to traditional education. Lee Montessori PCS will work to promote our scholastic vision and educate and inform community members of the value of the Montessori Method. Lee Montessori Public Charter School plans to publicize the school within the entire D.C. community, with specific attention to the N.E. quadrant. Initially, the following types of marketing approaches will be used for community outreach:

- **Parent Interest Form:** A Parent Interest Form, created by the founding members, will be circulated door to door and through information sessions at daycare centers, churches, libraries, and appropriate local establishments. Circulation initially began in February 2013, and is expected to continue monthly until the start of the 2014-2015 school year. The Parent Interest Form allows Lee Montessori Public Charter School to keep track of all potential families and interested parties who support our mission.
- **Listservs:** An announcement introducing Lee Montessori Public Charter School and soliciting support has been posted on the listservs of the following neighborhoods in Ward 5: Eckington, Bloomingdale, Truxton Circle, Edgewood, Brookland, and Brentwood. An announcement was also posted on the listserv serving the Capital Hill neighborhood on the border of Wards 5 and 6. Within one week of its posting Lee Montessori Public charter school received over 35 responses supporting the addition of a Montessori charter school in Ward 5 as well as suggestions, advice and input from interested parents. Lee Montessori Public Charter School will expand its solicitation to include all Ward 5 and Ward 7 neighborhoods within the next few weeks.
- **Community Survey:** Lee Montessori Public Charter School will create and conduct a community survey, which will help guide the school in creating programs based on community input and expectations. These surveys will be conducted over the next six months during information sessions, community forums, by mail, and by phone. Lee Montessori PCS plans to print paper announcements with information leading to an online version of this survey. These announcements will be posted throughout Ward 5 and Ward 7 in local community establishments.
- **Media:** Lee Montessori Public Charter School will submit a short written piece outlining the school's mission, to be placed in community newsletters and local Washington, DC newspapers. The school plans to advertise and solicit support through the use of social media, such as Twitter, Facebook, and LinkedIn. Flyers promoting Lee Montessori Public Charter School will also be made and distributed through the community. Lee Montessori Public Charter School will also advertise through Washington, DC public radio stations. Dependent on market research, Lee Montessori will consider advertising on billboards, Metro stations, and Metro buses.

- **Website:** Lee Montessori PCS will develop a website where community members and future school families can follow school progress and stay updated on community events and programs where Lee Montessori Public Charter School will be represented. All interested parties will have the opportunity to reach the founding members with any inquiries through the website.

Identify and describe relationships with community organizations that assist in outreach and recruitment efforts.

Lee Montessori Public Charter School will partner with multiple national and local organizations to enrich our academic programs, extracurricular activities, and the student and family community experience. These partnerships and programs will improve the community presence of Lee Montessori Public Charter School and encourage the recruitment of new families. The following organizations have been contacted regarding future partnerships with Lee Montessori Public Charter:

- Association Montessori Internationale-USA
- Washington Montessori Institute
- Lifting As We Climb
- The Juliana Group
- Cassidy Turley
- Building Hope
- EdOps
- Girl Scouts of the USA
- North American Montessori Teachers Association
- Maitri Learning
- Florida Avenue Baptist Church
- Cardinal Bank
- Friendly Design Co.

Student Recruitment

Lee Montessori Public Charter School has already garnered strong interest from the NE community, as two of Lee Montessori Public Charter School's prospective teachers are currently teaching in Ward 5. These teachers have proven to prospective families the value of the Montessori Method. Members of our founding team include parents who have invested time in Lee Montessori PCS specifically with the intent of enrolling their children. They have begun to spread the word within their social circles and communities, and as a result we have an overwhelming amount of support and interest from parents who intend to enroll their children.

Recruitment will be an ongoing process including the following efforts:

- Media Coverage and advertisements
- Community focus groups
- Heavy solicitation at daycare centers targeted to recruit incoming 3 and 4 year-olds
- Door to door canvassing
- Word of mouth through current community members
- Direct mailing to potential families
- Open house tours and program tours
- Posting and distribution of flyers and print media throughout Ward 5 and Ward 7

January-May	Reach out to local and national organizations to garner partnerships; begin hosting monthly community forums open to all community members; begin door to door solicitation and petition signing; secure partnerships
March –May	Complete design of print media and signage; begin distribution to local community, centers, day-cares centers, churches and libraries.
June – August	Continue door-to-door solicitation using print media; continue monthly forums; begin to advertise in Metro facilities, in newspapers, on public radio stations and possibly public television.
September	Host a fundraiser open to the community
September – February 2014	Work with community partners to continue distributing information
January – March	Applications accepted
Late March	Lottery held if needed; mail results to family
April	Mail confirmation/welcome packets to family
May	Enrollment confirmation and information forms from families due
June	Individual and group orientations scheduled

Recruitment Strategy to Ensure Adequate Enrollment

According to OSSE’s enrollment audit data, there is high demand for public Montessori preschool and pre-K. The demand is so high that many of the schools have waiting lists. One public charter school and one DCPS school in particular, have extensive waiting lists. According to OSSE’s most recent audit, the Latin American Montessori Bilingual (LAMB) Public Charter School has the capacity to house 262 students in grades Pre-school through 5th grade. At the start of the 2011-2012 school year, LAMB expanded to their temporary Michigan Park Campus to accommodate 80 new students between the ages of 3 and 4. The same year, LAMB’s waiting list for Preschool / PreK (Montessori Primary) had approximately 525 students. For the 2012-2013 school year, Capitol Hill Montessori at Logan had 557 new family applicants with only 211 total seats to accommodate all children grades PreS-5th. Capitol Hill Montessori at Logan took in 51 Preschool students out of the 557 applications.

Thurgood Marshall ES (DCPS) has housed a long standing Montessori early childhood program and has had a waiting list for several years. Thurgood Marshall ES has been slated to close in June of 2013 due to low enrollment in the non-Montessori 1st through 5th grades.

Once Thurgood Marshall ES closes, there will no longer be an accredited Montessori program in Ward 5. Lee Montessori PCS has begun the recruitment process, by word of mouth in Ward 5, even though we are still in the planning phase. The recruitment process will be an expansion of the above mentioned recruitment methods and broader outreach efforts. We feel that meeting with interested families is the best way to garner interest and potential enrollment. We have begun hosting community meetings in the Ward 5 neighborhood where our Founding Board members are presenting information about the opportunities Lee Montessori PCS will provide its students and emphasizing the quality education they will receive. We plan to hold similar meetings in Ward 7. Our goal is to recruit 70 total students across grades Preschool, PreK, Kindergarten and 1st grade for the 2014-2015 school year. By school year 2018-2019 Lee Montessori will have approximately 198 students.

We are aware that our goal of enrolling 70 children in a city where public and charter schools are readily available is ambitious. However, we are planning to recruit heavily in Ward 5, an area with currently only one Montessori school and available only by lottery: LAMB PCS – Taylor Street Campus. We understand that a solid and extensive recruitment plan is necessary to meet our goal. According to the current data available at focusdc.org/data and from the Public Charter School Board, after June 2013, there will be four Montessori programs serving majority disadvantaged children in the entire DC area: J.C. Nalle ES, (Ward 7), Burrville ES (Ward 7), LAMB PCS – Main Campus (Ward 4), and Shining Stars Montessori Academy PCS (Ward 1). Of those four, two do not offer a full Montessori program. Both J.C. Nalle and Burrville have small Montessori programs housed inside traditional schools. J.C. Nalle currently offers two Primary classes (ages 3-6) and one Lower Elementary class (ages 6-9). Burrville houses two Primary classes and is currently the only AMI accredited of these schools. LAMB PCS currently houses seven primary classrooms, three lower elementary, and one upper elementary classroom.

We understand that one of our biggest challenges recruiting new families will be emphasizing the advantages of Montessori education. A strong effort will be made to introduce the Montessori Method to families as an alternative to traditional scholastic programs offered in Wards 5 and 7 and throughout the city. We plan to reach out to potential families in the manner as outlined in our Community Outreach plan. In addition, we will make multiple public appearances monthly to discuss Montessori education and host Montessori FAQ sessions to assure parents of the benefits of a Montessori education.

Target Population and Open Enrollment Process

Lee Montessori PCS will be open to all DC residents; however we plan to heavily recruit in the Ward 5 and Ward 7 areas, as this is our first choice of neighborhood locations. Should our location change, our geographic focus of recruiting will change. We consider this geographic concentration appropriate, as we will be admitting very young children to fill open seats, and parents value proximity when busing young children is not an option. We will be recruiting citywide as well through canvassing, mass mailing, various print media advertisement, and radio advertisements. Prior Montessori experience is neither a prerequisite nor expected for students enrolling in Lee Montessori PCS. Preschool, Prekindergarten, Kindergarten, and 1st grade students will be accepted by application and if needed, by lottery. As required by law, there will no preferences given based on neighborhood in the lottery.

Lee Montessori Public Charter School will admit students of any race, color, national or ethnic origin, religion, or sexual orientation. Lee Montessori PCS is committed to ensuring that all students enjoy the same rights, privileges, programs, and access to activities available to students at the school. Lee Montessori PCS will not discriminate on the basis of race, color, national or ethnic origin, religion, or sexual orientation in any way.

C. FUTURE EXPANSION AND IMPROVEMENTS

Enrollment Targets and Plans for Future Expansion

Multiage Classrooms	2014	2015	2016	2017	2018
Primary (Ages 3-6)					

PS	30	30	30	30	30
PK	15	30	30	30	30
K	15	15	30	30	30
Lower Elementary (Ages 6-9)					
1st	10	18	20	30	30
2nd		10	18	20	30
3rd			10	18	20
Upper Elementary (Ages 9-12)					
4th				10	18
5th					10
ELL Students	3	5	6	7	8
Special Ed Students	4	6	10	14	18
Total	70	103	138	168	198

We have been in frequent contact with Building Hope and will be negotiating for an incubator facility. Lee Montessori PCS will remain in an incubator facility for approximately 3 years, or until a permanent facility is located. We are also working with realtor Kerri Salih of Cassidy Turley to secure a permanent site. At the moment a permanent facility has not been selected as we continue to work with Building Hope and Cassidy Turley. Our geographic preference is Ward 5 or Ward 7, though we will consider other areas as discussed in the facilities section. We would consider either an outright lease or purchase of a facility. We understand that in both scenarios, substantial renovation of the building is often required. This renovation, plus the facilities purchase if that option is pursued, requires a substantial capital outlay from the school. This spending is typically financed by borrowing, though lenders generally require equity contribution from the school. Lee Montessori PCS is committed to obtaining high quality professional guidance from groups such as Cassidy Turley and Building Hope to help it successfully navigate the long-term facilities hunt.

Our Board is aware of the potential facility costs and is actively planning fundraising efforts to meet those needs. Lee Montessori PCS also plans to help support this process by using conservative budget practices to generate modest yearly cash surpluses from operations.

Our fundraising team is putting together a plan to secure the appropriate building acquisition funds by Fall of 2016. Once funding is secured, Lee Montessori PCS plans to build by Fall of 2017, at an additional cost to be estimated by the Cassidy Turley project management team.

If housed in an incubator facility, Lee Montessori PCS expects to do little to no renovation. We have, however, budgeted funds for minimal renovations during the first few years. Part of our work with Building Hope and Cassidy Turley is ensuring that any selected temporary site is also in compliance with all building and safety codes. All monies used for acquisition of a site will be raised through private fundraising spearheaded by Lori Smedley, our Fundraiser/Development Coordinator, and held in escrow by Building Hope.

As Lee Montessori Public Charter School grows, we will work to ensure that our staff meets the growing and evolving needs of our students. New teachers and staff will be held to the same high standards as our initial teachers and staff. We plan to recruit heavily from the Washington Montessori Institute of Loyola University, Maryland, as well as from other nationally recognized Montessori training centers. We will continue to attend Montessori seminars and conferences to maximize opportunities to recruit experienced staff for all positions.

C. PLAN OF OPERATION

1. STUDENT POLICIES AND PROCEDURES

A. TIMETABLE FOR REGISTERING AND ENROLLING

Important Dates for Enrollment

Lee Montessori PCS will join the charter schools that are participating in the PCSB’s Your Charters, Your Choice initiative and will subscribe to the common application and lottery dates as they are released.

Development of marketing materials and student applications	July 2013
Community informational meetings	September 2013-March 2014
Applications available	January 2014
Applications due	March 2014, Common due date
Public lottery (if applicable)	April 2014, Common lottery date
Public notification of lottery selection	April 2014, Common notification date
Intent to enroll deadline	May 9, 2014
Collection of registration materials including residency verification, home language surveys, and information related to educational needs	April –August 2014
Waitlist selection announcement	June 2014
Parent Workshops and Student Orientations	July-August 2014
First Day of School	August 19, 2014

Lottery System and Sibling Preference Enrollment

In the event the school is oversubscribed, all applicants will be entered into a lottery, which will be publicly drawn on the common lottery date. Once capacity is reached, remaining applicants will be placed on the waiting list in the order determined by the lottery. A waiting list will be kept in the main office for the entirety of the school year but will only be valid for the current school year. Lee Montessori PCS will grant preference in the enrollment process to the following:

1. Applicant siblings of an applicant accepted during the lottery process;
2. Applicant siblings of currently attending students; and
3. Children of founding group members, up to 10% of enrollment or 20 students, whichever is less.

B. POLICIES AND PROCEDURES FOR ENROLLMENT AND WITHDRAWAL OF STUDENTS

Enrollment and Withdrawal Procedure for Residents

Any student who is of appropriate age and grade level and is a resident of the District of Columbia will be eligible for admission to Lee Montessori PCS. The only limitation to admission will be the number of slots available in a given grade. Prospective students will be admitted without regard to

aptitude, achievement, ethnicity, nationality, gender, disability, language proficiency, sexual orientation, or any other basis prohibited by law.

Admitted families wishing to enroll their children in Lee Montessori PCS must complete an enrollment packet that documents proof of residency, current immunizations, special education status (if applicable), 504 service agreement (if applicable), a free and reduced lunch form (optional), and a home language survey. In addition, families must attend a one-on-one or small group meeting with the Head of School or delegated school representative to sign an agreement committing parents/guardians to being an active participant in their children's Montessori education. At this meeting, an individual orientation for each child will be scheduled for a date prior to the start of school that will introduce the child to his or her teacher, school culture and discipline expectations, etc.

Parents/Guardians may choose to withdraw their children from the school at any time. To the extent possible, the Head of School will seek to hold exit interviews with the parents/guardians of withdrawing students in order to gather as much information as possible regarding reasons behind the withdrawal. The data collected will be used to shape future school decisions.

Enrollment and Tuition Policy for Non-Residents

After all District residents who wish to attend the school have enrolled, if there are still spaces remaining, these seats may be opened up to non-district residents. Non-resident students must pay tuition in the amount set by the Office of the State Superintendent of Education.

2. HUMAN RESOURCE INFORMATION

A. KEY LEADERSHIP ROLES

Interim Leaders

Chris Pencikowski, Megan Hubbard, and Austyn Brickler will lead day-to-day work during the planning year. The trio brings a strong combination of academic, charter operations, and general school experience to the challenge of launching the school. All three plan to transition into various full-time roles with the school after the planning year, aiding with issues of both continuity and commitment to the successful implementation of the charter.

Administration. Founding member Chris Pencikowski will act as the interim Head of School during the founding year. Mr. Pencikowski is the former Chief Operating Officer of the high performing DC Public Charter School, AppleTree Early Learning PCS, and is well versed in the design and implementation of public sector operations systems and charter school management. Mr. Pencikowski will be contracted on a full-time basis beginning in July 2013 to support operations planning, assist in development/fundraising, work with stakeholder groups, and build student enrollment, staff recruitment, and vendor selection pipelines. It is further anticipated that Mr. Pencikowski will apply to be the Head of School for School Year 2014-15. Mr. Pencikowski will be supported in his efforts by Founding Group member Kelly Smith, as well as Ms. Hubbard and Ms. Brickler. Ms. Smith was the former Head of School of a charter school in Philadelphia serving a very similar target population.

Curriculum Designer. Founder Megan Hubbard will act as the interim Curriculum Designer during the planning year. Ms. Hubbard is AMI certified in primary Montessori, has five years of experience teaching in the public Montessori sector in Washington DC, and is trained in both the DIBELS and GOLD assessments Lee Montessori PCS will employ. In addition she has extensive experience aligning the Montessori curriculum with traditional standards. Ms. Hubbard plans to spend 100% of her time during the planning year in this capacity (50% on a contract basis and 50% volunteer). It is further anticipated that Ms. Hubbard will apply to be the Principal for School Year 2014-15.

Operations Manager. Founder Austyn Brickler will act as the interim Operations Manager during the planning year in a full-time capacity, with the expectation that, during the summer of 2014, she would lead the recruitment, hiring, and onboarding of the Operations Manager for School Year 2014-15. Given her work on the business and operations sections of the charter application and her experience teaching in the public Montessori sector in Washington, DC, Ms. Brickler is well-positioned to add value to the implementation of the charter in this capacity. She will be able to lead work on traditional operations tasks such as student recruitment efforts as well as draw on her instructional background to assist Ms. Hubbard with the huge volume of planning year work related to academic operations (e.g. drafting student handbooks, planning school calendars, etc.). Ms. Brickler will be greatly aided in her efforts by the strong charter operations background of Mr. Pencikowski. In addition, Ms. Brickler will receive support on a volunteer basis from founders Susan Klinger, Lori Smedley, Clara Smith, and Kelly Smith. Ms. Klinger and Ms. Smedley currently work in the finance and fundraising sectors respectively, and Ms. Clara Smith is the lead founder on Lee Montessori's facilities working group. Lee Montessori also plans on contracting EdOps to assist with the financial and operational components of the planning year. Ms. Brickler plans to spend 100% of her time during the planning year in this capacity (50% on a contract basis and 50% volunteer). It is further anticipated that Ms. Brickler will apply to be the Extracurricular Director for School Year 2014-15.

Legal Counsel. Founding member Abbey Hairston, Esq. is serving as the legal counsel for Lee Montessori PCS on a pro bono basis.

B. QUALIFICATIONS OF SCHOOL STAFF

Lee Montessori PCS will have extremely high standards for hiring staff that are committed to the Montessori philosophy and are dedicated to using this educational approach as a means of sustaining high student achievement and producing life-long learners. The Board and management will set high standards for all school staff, both in terms of academic qualifications, experience and personal characteristics. As the School is requiring AMI certification# for all of our primary and elementary lead teachers as well as fulfillment of the Praxis requirements described in the Teachers section, our hiring criteria will exceed the requirements of the Elementary and Secondary Education Act. The School is also requiring our classroom assistants to commit to complete the AMI Assistant's training course within their first year of employment.

The Standards for Hiring School Staff are as follows:

Head of School

The Head of School will act as the overall leader of the school. A candidate for Head of School will be expected to meet the following qualifications upon hiring:

- Demonstrated knowledge, degree or work experience in management, accounting and finance;
- Holds a Master's degree or higher or commensurate work experience related to the role (education, non-profit management, business or other related field);
- Excellent communication skills and the proven ability to motivate and connect to a diverse group of stakeholders;
- Significant experience in community outreach especially in economically disadvantaged community;
- Demonstrates a strong commitment to education and experience with or willingness to gain a deep understanding of Montessori Education; and
- Experience in building relationships with and securing donations from a variety of public and private sources.

Principal

The principal acts as the academic lead and is responsible for all instructional components of the school. A candidate for principal will be expected to meet the following qualifications upon hiring:

- Minimum of a Bachelor's degree is required, a Master's degree is preferred;
- Holds an AMI teaching certification in at least 1 level;
- At least 3 years as a Montessori classroom teacher;
- At least 2 years of experience in educational administration;
- Demonstrates a very strong knowledge of curriculum development and the alignment of Montessori curriculum to the Common Core standards;
- Commitment to the Montessori method;
- Ability to analyze school data and report performance data to Head of School, Board of Trustees, the PCSB and other stakeholders;
- Skills facilitating group meetings and events;
- Ability to establish priorities, manage budgets and allocate resources; and
- Strong knowledge of education trends and best practices in alignment with the Montessori curriculum.

Operations Manager

The Operations manager is responsible for managing the school's daily financial and business operations, facilities operations, accounting, budgeting, vendor management, and related tactical and strategic operational duties. A candidate for Operations Manager will be expected to meet the following qualifications upon hiring:

- At least a Bachelor's degree and/or a professional certificate in one of the following fields: accounting, business/finance or non-profit management (MBA preferred);
- Minimum of 3 years work experience in non-profit management; and
- Experience with accounting and finance with non-profit or academic organizations.

Teachers

Lee Montessori will require all Primary and Elementary Montessori teachers to meet the following requirements:

- AMI Certification at level teaching;
- Passing score on the Praxis I;
- Passing Score on Early Childhood Education Praxis for Primary level teachers;
- Passing Score on the Elementary Praxis II for Elementary level teachers; and

- Two or more years of classroom experience preferred.

Specialty Teachers

All music, art, physical education and foreign language classes will be taught by a Specialty Teacher. A candidate for Specialty Teacher will be expected to meet the following qualifications upon hiring:

- Minimum of a Bachelor's degree in special subject (music, foreign language, art, P.E., etc.);
- Passing score on the Praxis I;
- Passing Score on Early Childhood Education Praxis if teaching Primary Elementary Montessori;
- Passing Score on the Elementary Praxis II for Elementary level teachers; and
- Two or more years of classroom experience preferred.

Classroom Assistants

Classroom Assistants play a vital role aiding in the day-to-day functioning of each classroom. A candidate for Classroom Assistant will be expected to meet the following qualifications upon hiring:

- AMI Assistant's Certification or willingness to complete the summer course;
- Demonstrated the ability to work respectfully with young children;
- Classroom experience preferred but not required; and
- Obtained an Associate's degree or higher or pass the paraprofessional Praxis.

Office Manager

The Office manager will provide administrative support to Head of School, Principal and Operations Manager, act as school registrar, greet and assists all visitors with respect and be willing to perform other appropriate job duties as assigned. A candidate for Office Manager will be expected to meet the following qualifications upon hiring:

- Demonstrated experience performing personnel management including employee time and attendance;
- Demonstrated ability to maintain confidentiality with personnel and student records and all related data;
- Hold an Associate's degree or higher in a related field; and
- Have experience in a non-profit or academic setting.

Staff recruitment for the school will draw heavily on the local and national Montessori community to attract passionate and experienced individuals who are committed to providing a Montessori education to the schoolchildren of the District of Columbia. Recruitment of these talented teachers will be of the utmost importance to the success of Lee Montessori PCS, and to that end, the members of the founding group have already begun to leverage their resources and networks to spread the word about future employment opportunities.

The first official recruitment outreach took place in February of 2013, when two of the members of the founding group attended the 2013 AMI Refresher Course in Tampa, FL which included a networking event with over 700 current Montessori administrators, teachers, assistants, and parents where they advertised Lee Montessori PCS's charter proposal and collected contact information from individuals interested in future employment with the school.

Following an approved Charter, Lee Montessori PCS staff will actively advertise and pursue a diverse group of candidates using several of the Montessori organizations that connect trained

educators with employment locally and internationally including the North American Montessori Teachers' Association (NAMTA), the Association Montessori Internationale/USA (AMIUSA), and the local training center, Washington Montessori Institute (WMI). In addition staff will use a variety of media and outreach techniques to reach prospective employees including print, radio, web-based advertising and personal contact and word-of-mouth.

Employment at Lee Montessori PCS will be contingent upon the passing of a background check prior to beginning to work in the school. Proof of the background check will be kept on file at the school. Any volunteer working more than 10 hours per week at the school or who is likely to be left alone with groups of children will also be required to complete the same background checks as our full time employees. Background checks will be conducted by a firm that searches national databases.

C. STAFFING PLAN

Staffing Plan

	Planning Year 2013-14	Year 1 2014-15	Year 2 2015-16	Year 3 2016-17	Year 4 2017-18	Year 5 2018-19
Head of School	1 (interim)	1	1	1	1	1
Principal (Curriculum Director during Planning Year)	1 (interim)	1	1	1	1	1
Lead Teachers		4	4	5	7	8
Specials Teachers		0	1	2	3	4
Classroom Assistants		3	3	3	3	3
SPED Coordinator		1	1	1	1	1
Extracurricular Director		1	1	1	1	1
Dean of Students/ Family Outreach Coordinator		0	0	1	1	1
Operations Manager	1 (interim)	1	1	1	1	1
Office Manager		1	1	1	1	1
Café Coordinator		0	0	0	1	1

Montessori classrooms at the primary and elementary levels typically have 25-35 students per class, which is larger than traditional programs aim to be. In a traditional classroom the teacher is seen as the main source of instruction and fewer children leads to greater individual attention from the teacher. However, in the Montessori classroom the children are learning from a variety of sources including the observation of other students using materials and peer instruction. In addition, with the mixed ages at each level, a large class size ensures there will be many personalities with whom the children may practice their social skills. In the classroom, AMI standards dictate that there shall be only one trained lead teacher in Primary and Elementary classrooms, although there must be an assistant in the Primary classrooms to maintain proper supervision ratios. We have followed these standards in designing our 5-year staffing model.

Administration Years 1-5. The School will hire and maintain a full time Head of School, Principal, and Operations Manager in Years 1-5. If additional funding is acquired, a full-time Curriculum Director would be added that would report directly to the Principal, starting as soon as possible.

Classroom Staff. Each Primary classroom will have a full-time lead teacher and a full time assistant. After Year 3, if the budget allows at least one half-time assistant to the lower elementary (grades 1-3) classrooms will be added. In addition, children will have special education and ELL support if needed.

Specials Staff. The Montessori curriculum is designed to encompass areas that children often participate in during special classes such as art, music, and physical education. With this in mind, the School will postpone the hiring of specials teachers until Year 2. In Years 2-5, specials teachers will teach foreign language during the school day and art, physical education, music as part of the extended school day. The School will require that these teachers are well-versed in Montessori theory and are willing to implement this knowledge while teaching these specials classes.

Extracurricular Director. A full time Director will be hired in Year 1 to manage the before school, after school and lunch (through Year 3) programs. The Director will receive Montessori professional development and will collaborate often with the Head of School and Curriculum Director to ensure the programming offered follows the school's mission and philosophy.

Special Education Coordinator. Lee Montessori PCS will have a full-time Special Education Coordinator starting in Year 1 who will provide direct services to students, support teachers, and manage case files. The coordinator will also manage any contract services required by the students' IEP, which we have included in our budget for Years 1-5.

Dean of Students/Family Outreach Coordinator. In Year 3, we will add a Family Outreach Coordinator who will foster family participation and leadership by facilitating regular parent meetings and events. The outreach coordinator will also identify needed resources for families and respond to parents' needs by facilitating workshops and activities and linking families to community resources. This individual will also assist parents in accessing health services if needed.

Café Coordinator. In Year 4, we will add a Café Coordinator who will take over the food service responsibilities for breakfast, lunch, and supper. Prior to that time, the Head of School will oversee the logistics of meal times and delegate responsibilities to the staff as necessary.

D. EMPLOYMENT POLICIES

Employment Policies

The Board of Trustees, in conjunction with legal counsel, will create and approve an Employee Handbook prior to the official hiring of any employee of the school. The handbook will include staff contracts, evaluation plans, salary and benefits, and other policies. Policies in the handbook will be based on the following principles:

Salaries and Benefits:

Employees' wages, benefits, and working conditions will be reviewed on a regular basis in order to ensure that we are continuously competitive in the charter school market. We are currently setting our teacher salaries far above the private Montessori schools in the area and commensurate with the local and charter schools. Whenever a new DCPS teacher union contract is released, the Board will review the contracts to ensure our salaries continue to be competitive.

Lee Montessori PCS benefits will include health care, dental care, vision care, and a retirement savings plan. Our employment policy will also include provision for hiring former DCPS employees. In the event that a current DCPS employee is hired at Lee Montessori PCS, he or she may request a two year leave of absence from DCPS, renewable for an unlimited number of two year terms, during which time the employee may opt to have the school pay into the employee's DCPS retirement plan at the rate required by the DC Teachers Retirement System.

Hiring and Dismissal

Employees will be selected without discrimination with regard to race, color, religion, national origin or ancestry, sex, age, marital status, personal appearance, or sexual orientation or gender identity. Once an employee has been hired they will sign one-year at will contracts. In the event that an employee must be terminated, the school administration shall make all efforts for an amicable separation. Depending on the grounds of the termination, the employee may be eligible for unemployment benefits. All Lee Montessori PCS instructional and leadership staff will be at-will employees.

Performance Evaluations

Teacher Evaluations

All teachers at Lee Montessori PCS will participate in regular, on-going evaluation by the Principal. This evaluation will include observations, side-by-side feedback, and quarterly goals set by the teacher and his/her superior. In addition to the on-going evaluations and feedback, each teacher will participate in a formal annual review completed by the Principal using a rubric developed during the planning year.

Teacher evaluation criteria will include, but is not limited to:

- Demonstration of knowledge of Montessori pedagogy and the scope and sequence of the lessons given at each age level;
- Commitment to maintaining the proper prepared environment as it is an essential component of the Montessori curriculum;
- Effective and consistent use of differentiated instructional strategies in order to reach all levels of learners;
- The creation of a peaceful and orderly classroom environment promoting student independence; and
- Workplace professionalism.

Administration Evaluations

The Principal and the Operations Manager will receive annual employee reviews, conducted by the Head of School. We will develop the evaluation criteria during the planning year using the models set forth in the North American Montessori Teacher's Association (NAMATA)'s Whole School Handbook.

The Board of Trustees is responsible for conducting all evaluations of the Head of School. Prior to the Head's evaluation, the Board of Trustees may request feedback from staff members, board members, and parents regarding his/her performance of the duties of Head of School. A rubric for

reporting requirements						
Continue to identify data collection needs and reporting tools and requirements						
Research and purchase select software for student, staff and school assessments (Montessori and DC applicable)						
Create templates for student record forms						
Create discipline policies, including suspension and expuls						
Admissions						
Determine application period						
Create student application						
Establish lottery procedure should the applications received exceed the number of seats available						
Establish deadline for applications						
Create confidentiality policy for student and staff records						
Accept student applications						
Determine registration policies						
Verify system for recording student attendance						
Hold lottery if needed and establish wait list						
Inform families of acceptance in writing and through telephone calls						
Confirm acceptance and registration						
Request student records, medical and academic						
Notify families if they are moved off the wait list and inform them of registration procedure						
Hold group orientations for incoming students and families						
Hold individual teacher/student Montessori classroom orientation						
Board of Directors						
Create the Board of Directors Policy and Procedures Manual						
Determine the strategy for transitioning founding Board members to the Board of Directors, the governing body of the school						
Hold first annual Board of Directors meeting						
Establish positions and committees of the Board of Directors						
Hold a Board of directors retreat to further expand relationships and governance policies						
Complete all governance documents						
Accept applications and elect parent members						
Development and Fundraising						
Apply for private, federal and corporate grants						
Educational Plan						
Create curriculum						
Align Montessori curriculum with state standards						
Align curriculum with accountability and goals						
Create professional development program for teachers and staff						
Create extracurricular programs and academic enrichment programs						
Administrative staff and contracted teachers attend						

Montessori specific professional development conference						
Support staff attends Montessori training course						
Summer orientation for all employees						
Facilities						
Visit incubator spaces through Building Hope						
Select school site						
Finalize lease						
Renovations (plumbing, HVAC, windows, kitchen, classrooms, outdoor space) if required: <ul style="list-style-type: none"> Secure financing through grant or loan Create construction documents and select contractor Create timeline for completion of renovations Determine contingency plan if renovations are not completed by start of school (including staff training outside of facility) 						
Complete inspections						
Obtain Certificate of Occupancy						
Hire custodial staff if not in an incubator site						
Order furniture for classrooms, common and office spaces						
Install technology						
Teachers arrange classrooms						
Building opens to the public						
Financial						
Open school bank account (Completed)						
Acquire insurance policies						
Create financial management systems with EdOps						
Develop financial policies with EdOps						
Establish internal accounting and financial reporting systems						
Acquire proper software for financial management						
Develop budget and submit to the PCSB in June						
Determine payroll system to be used						
EdOps orients new staff on financial management procedures						
Food Service						
Determine food service needs and obtain quotes from vendors; Contract with selected vendor						
Determine any facilities changes needed to meet food service needs						
Governance						
Establish by-laws (completed)						
Write the Articles of Incorporation (Completed)						
Apply for 501c3 status (Completed)						
Determine instructional leadership team						
Create student and academic support team						
Health and Safety						
CPR and First Aide training for all staff						
Food Safety and Sanitation for appropriate staff						
Establish emergency plans and evacuation routes						

Schedule fire drills						
Legal						
Receive approval of charter						
Review Facilities Lease (immediately upon identification of facility)						
Sign contract with chartering agency						
Marketing						
Design and create marketing material for print media						
Develop a timeline for community outreach						
Develop partnerships with local and national entities						
Develop a website						
Identify and train community volunteers						
Host community meetings						
Develop plan for and begin staff recruitment						
Distribute print media						
Begin running adds for school in local papers and through local radio stations						
Parent/Family Involvement						
Create school information packets						
Host and invite potential parents/families to community meetings						
Create a Family Advisory Council						
Personnel						
Determine salary scale						
Confirm or recruit/hire Head of School						
Write employment contract						
Write employee handbook						
Determine benefits package						
Finalize job description for administration						
Recruit/place administrators						
Determine Lead Teacher job description						
Recruit and interview Lead Teacher candidates						
Determine support staff job descriptions						
Recruit and interview support staff (academic and non-academic)						
Check references and run background check on potential hires						
Hire Lead Teachers and support staff (academic and non-academic)						
Create employee evaluation plan						
Develop timeline for teacher and staff professional development for year 1						
Create personnel files						
Hold employee orientation						
Distribute employee handbooks						
Hold elections for staff representatives for committees as outlined in the Governance section						
Procurement						
Establish policies and procedures						
Establish in-kind donation relationships						
Determine needed furniture and teaching materials						
Order furniture and teaching materials						
Outreach						

Begin door-to-door solicitation of support						
Host monthly community forums						
Establish and develop partnerships with community stakeholders						
Determine with community leaders the needs of the community						
Establish community outreach committees, with members of the Board, community and potential parents, and develop a plan to meet the community's needs						
Implement above plan						
Special Education						
Hire Special Education coordinator						
Create SpEd confidential record keeping process						
Determine referral process						
Develop SpEd program and service delivery approach (internal and external)						
Acquire student files including all IEPs from previous schools						
Identify students with IEPs						
Technology						
Develop technology plan						
Determine software and hardware needs						
Obtain quotes from vendors regarding hardware needs						
Setup database and infrastructure						
Train staff to use assessment hardware and software (e.g. iPads for GOLD assessments)						

Technology and Data

Lee Montessori Public Charter School will use Montessori Compass as an effective Student Information System (SIS). Montessori Compass allows for complete recordkeeping and data to be available to all staff through the Montessori compass online database. Montessori Compass will allow Lee Montessori Public Charter School to input and maintain data such as the students' individualized lesson plans, progress, demographics, attendance, behavior, contact information, and assessments. By using an online record-keeping database we can provide parents with weekly, individualized reports on their child's academic and social progress. Montessori Compass will also allow teachers to provide suggestions for home activities that align with the Montessori curriculum with each report. Through Montessori Compass both students and parents will have access to student schedules, grades, assignments, and a school calendar. The staff will have access to necessary student and family information. This system will allow for open and clear communication amongst staff as well as with families to make certain each child reaches his or her full potential with the appropriate levels of support inside and outside of school. Montessori Compass can be accessed by staff and parents at any time on any web-enabled device.

Lee Montessori Public Charter School will comply with all PCSB reporting requirements and submit required updates to the PCSB regarding student attendance, demographics, and discipline using the data contained in Montessori Compass.

Lee Montessori Public Charter School fully understands that many families do not have access to the Internet; therefore we will keep families up to date on their children's progress regularly

through informal and formal parent/family discussions and conferences in addition to the information available online. Teachers and staff will have email addresses available for all families to promote open and constant communication with families who have Internet access. A regular newsletter will also go home with each student to keep parents informed of events happening at Lee Montessori Public Charter School and the surrounding community.

Computers are not often used in Montessori classrooms as a learning tool. However, Lee Montessori Public Charter will create a media room where all students will have access to the computers to assist in research and other learning activities under the teacher’s discretion. iPads and desktop computers will also be available in the Elementary classrooms for immediate Internet access by the students for learning-related activities.

The facility that will house Lee Montessori Public Charter School will be outfitted with a high-speed wireless Internet connection. This will ensure the constant progress monitoring of the students amongst staff and administrators, which in turns promises the best education plan for each individual child will be offered. The Director of Curriculum will be responsible for the data collection and management as well as reporting the data to the Board of Directors and the PCSB.

C. MAJOR CONTRACTS PLANNED

Note: No applicant will be approved without a timeline that demonstrates adequate plans for procuring needed services, such as identification and renovation of a facility, food services, lease, textbooks, etc. See SRA §38-1802.02(6)(c) and § 38-1802.04(c)(1).

Major Contracts Planned

Lee Montessori Public Charter School plans to enlist the following services from vendors that will exceed \$25,000:

Prospective Contractors	Services Provided	Estimated Costs - School Year 1
Revolution Foods	Food Services	\$56,071
Neinhuis; The Juliana Group	Classroom Furniture and Materials	\$122,750
Building Hope	Facilities	\$168,000
EdOps	Accounting/Payroll	\$35,000

The group is familiar with and has reviewed the Public Charter School Board’s procurement policy. Consistent with that policy, all qualifying contracts exceeding \$25,000 will be procured in accordance with PCSB guidelines and submitted to the PCSB for review.

D. SERVICES SOUGHT FROM THE DISTRICT OF COLUMBIA PUBLIC SCHOOLS

Services Sought from DCPS

Lee Montessori PCS will not seek any services from DCPS.

Lee Montessori PCS assures that the school will meet each of the following requirements:

Health and Safety: See SRA §38-1802.02(11) and §38-1802(c)(4); Health Schools Act of 2010; compliance of facilities with Americans with Disabilities Act and DC Fire and Prevention Code, see D.C. Code §6-501 *et seq.*;

Enrollment Data: See SRA §38-1802.04(c)(12);

Maintenance and Dissemination of Student Records: See SRA, Parts B and D, and other applicable laws, including D.C. Code §31-401 *et seq.* (compulsory school attendance); D.C. Code §31-501 *et seq.* (immunization of school students); D.C. Code §31-601 *et seq.* (tuition of nonresidents); and D.C. Code 29-501 *et seq.* (non-profit corporations);

Compulsory Attendance Laws: See D.C. Code §38-201, *et seq.*;

Title I of the Elementary and Secondary Education Act;

Civil Rights Statutes and Regulations of the Federal Government and the District of Columbia: see SRA §§38-1802.02(11); 38-1802.04(c)(5); and

Other: The public charter school will meet any other applicable requirements.

Signature: _____

Megan Fulbright

Date: _____

2/28/13

ANTICIPATED SOURCES OF FUNDS

	Planning Year	Year 1	Year 2
Student Enrollment			
Preschool		30	30
Pre-Kindergarten		15	30
Kindergarten		15	15
First Grade		10	18
Second Grade		0	10
Total Number of Students		70	103
% of students receiving special education services		5%	6%
% of students who are English Language Learners (ELLs)		10%	10%
Per Pupil Allocations			
UPSFF		\$919,919	\$1,377,896
Facilities Allowance		\$210,000	\$309,000
Per Pupil Revenue			
Total Per Pupil Allocation		\$846,731	\$1,238,781
Total Facilities Allowance		\$210,000	\$309,000
Total Special Education Funding		\$43,286	\$66,877
Total ELL Funding		\$29,901	\$43,998
Total Summer School funding		\$0	\$28,240
Total Per Pupil Charter Payments		\$1,129,919	\$1,686,896
Other Public Revenue			
Federal Entitlements	\$200,000	\$261,948	\$268,356
National School Lunch Program		\$20,659	\$31,899
Healthy Schools Act Program		\$1,502	\$2,349
E-Rate Program		\$0	\$5,253
Total Other Public Revenue	\$200,000	\$284,110	\$307,858
Private Revenue			
Grants and Donations	\$10,000	\$10,000	\$10,000
Activity Fees		\$77,955	\$116,885
Interest Income		\$1,856	\$2,921
Total Private Revenue	\$10,000	\$89,811	\$129,806
Total Income	\$210,000	\$1,503,839	\$2,124,560

BUDGET NARRATIVE

The budgeting process was driven by founding group members Austyn Brickler, Megan Hubbard, Clara Smith, and Dominique Fortune. For the technical modeling work, Lee Montessori partnered with EdOps, a D.C.-based firm specializing in providing accounting and financial services to the charter school community. EdOps has worked extensively with other D.C. charter schools, and it brought this experience to the budget planning process.

Budget assumptions were based upon data from comparable D.C. charter schools and EdOps' experience with charter school finances. In addition, the school founders met extensively with leaders at other charter schools and Montessori schools and with experts in the charter community; these meetings helped inform the budget assumptions, as well. Ultimately, the creation of the various school budgets was guided by three priorities: high-quality programming, financial sustainability, and fiscal conservatism.

High-Quality Programming: Lee Montessori intends to become a top-tier educational institution, offering its primarily low-income students and families with an excellent school choice option. Therefore, the budget reflects the investments necessary to create such a school, including above-average teacher salaries and dedicated support staff to drive instructional improvements and student achievement.

Financial Sustainability: Even the best educational program will be undermined if the resources are not available to sustain it. Thus, the second priority was to ensure that the school's operations are built on a financially sustainable path, one that provides long-term viability. This was achieved by planning for a minimum 5% cash surplus in each of the first five years of operations, thereby building up a reserve balance to protect against unforeseen emergencies and other risks associated with start-up charter schools (i.e. enrollment shortfalls, cash-flow issues, lack of operating history). Furthermore, by setting aside at least a 5% surplus each year, the school will be better prepared to finance the move to a permanent facility in a future year.

Fiscal Conservatism: The third priority in crafting the budgets was fiscal conservatism, both on the revenue side and the expense side. This was important because public education, as a taxpayer-financed enterprise, is subject to funding variability for both economic and political reasons. Additionally, as a new school, Lee Montessori will not have a reserve account to soften the blow of any revenue shortfalls or cost overruns. Thus, the budget was developed with conservative budget assumptions, such as budgeting for contingency line-items in several of the major expense categories and assuming the high end of the range for most expense categories.

PRE-OPENING (PLANNING YEAR) ASSUMPTIONS

The budget and cash flow projection for the Planning Year are attached (See Attachments 1 and 2). We are projecting \$210,000 in revenues - \$200K of which is from Title V-b Planning & Program Design funding and \$10,000 in private grants and donations. Most of the expense items are based on comparable data from other D.C. charter school planning year budgets and EdOps' experience.

As a new charter school with minimal reserves, cash will be tight during the Planning Year. As such, the school will seek to establish a \$25,000 line of credit with a bank to help cover the low-cash periods during the year (and into Operating Year 1, as well).

Upon charter approval, the school will apply for a start-up grant from the Walton Family Foundation, a strong supporter of the charter movement in D.C. that has provided such funds to other new charters in recent years. Based on this recent history, the typical funding amount is \$250,000. If Lee Montessori can secure this amount from Walton, then it will move forward and/or increase certain key expenditures and otherwise adjust its Planning Year budget accordingly. However, in order to maintain the conservative budget framework in this application, we will not assume receipt of this funding.

Revenues

- Federal Entitlements – The school has budgeted for \$200,000 in Title V-b funding, which is the expected amount for the Planning & Program Design phase.
- Private Grants & Donations – The school expects to conduct limited fundraising efforts during the Planning Year, raising approximately \$10,000 from primarily grassroots individual supporters of the school.

Expenses

- Contracted Staff – Per Title V-b rules, no regular staff can be hired and paid with V-b funds during the Planning & Program Design phase. Thus, all paid personnel during the Planning Year will be paid as independent contractors. This includes \$135K for the services of the presumptive Head of School and two members of the founding team that will develop the program, \$10K for FOCUS' charter school start-up program, and an IT consultant/website designer for \$4,000.
- Student Supplies & Materials - \$5,000 has been budgeted for the purchase of Montessori-related supplies during the Planning Year. This will likely occur near the end of the Planning Year.
- Miscellaneous Student Expense – \$7,500 has been set aside for student recruitment, which includes advertising, mailings, and printing costs.
- Rent – \$7,200 for rent has been budgeted. This assumes the school leadership will base its operations out of rented office space during at least a portion of the Planning Year.
- Office Supplies & Materials - \$3,000 for miscellaneous office supplies.
- Office Equipment Rental & Maintenance – \$4,500 for laptops and related technology equipment for the three members of the Founding Group working as consultants.
- Telephone/Telecommunications – \$3,500 to cover phone and internet access.
- Legal, Accounting, and Payroll – These include service fees for accounting software, bookkeeping, A/P, A/R, grants management, financial statement preparation and analysis, budgeting and reporting, as well as legal fees associated with the school's start-up.
- Insurance - \$2,000 for Directors & Officers liability and general liability insurance coverage.
- Other General Expense – \$2,000 for staff recruitment and filing fees related to the school's 501(c)(3) application.

OPERATING YEARS 1-5 ASSUMPTIONS

The budgets for Operating Year 1, Operating Year 2, and 5-Year Projections, as well as the Capital Budget for Years 1 and 2 and the Cash Flow Projection for Year 1, are attached (See Attachments 3-7). As with the Planning Year, these financial models were compiled using the three priorities of high-quality programming, financial sustainability and fiscal conservatism. We sought to craft a budget that would support the development of an outstanding educational program within reasonable financial constraints.

Revenues

Local/District Revenues

Public funding from the UPSFF (foundation-level and facilities) is 75% of total school revenue in Year 1.

The school expects a modest 4% increase over the next two years in the base UPSFF from the current school year level of \$9,124/student in 2012-13 to \$9,493/student in 2014-15 (2% increase in 2013-14 and 2% increase in 2014-15). In subsequent years, we modeled a 3% annual increase in the foundation-level UPSFF. All current funding weights/multipliers were maintained at the same level within the per-pupil funding formula for all five years. See chart below for a depiction of the funding rates for pre-school, pre-K, and K-5 students.

Funding/Student	2014-15	2015-16	2016-17	2017-18	2018-19
Pre School	\$12,720	\$13,102	\$13,495	\$13,899	\$14,316
Pre-K	\$12,340	\$12,710	\$13,092	\$13,485	\$13,889
K	\$12,340	\$12,710	\$13,092	\$13,485	\$13,889
Grade 1-3	\$9,493	\$9,777	\$10,071	\$10,373	\$10,684
Grade 4-5	\$9,493	\$9,777	\$10,071	\$10,373	\$10,684

For facilities funding, we maintained the current rate of \$3,000/student for all five years.

SPED enrollment was estimated at 5% initially, which is below the average for D.C. charter schools. The school will be fully prepared to serve a higher SPED enrollment, but we are assuming a lower rate given the large number of PS & PK students in its early years who will have likely not yet been identified as SPED students. We are assuming a growth in the SPED enrollment in subsequent years, growing to 9% of the student body by Year 5. Low-income enrollment (free and reduced-lunch (FRL) percentage) was set at 30%, in-line with or slightly below its proposed neighborhoods.

Federal Revenues (17% of total school revenues in Year 1)

We assumed \$250K from Title Vb for the Initial Implementation-Year 1 phase of the three-year grant. As the school will operate as its own LEA for the purposes of special education, we have assumed IDEA 611 and IDEA 619 funds of approximately \$11K.

Among the federal Title funds, we have budgeted for just Title II funds (\$1.2K) as the school's projected free and reduced-lunch (FRL) percentage of 30% is below the approximately 40% threshold that is needed to be eligible for Title I funds in the District. The school will not pursue Title III funding, since it does not expect to have enough ELL students to qualify for funding on its own and the administrative costs of participating in a Title III consortium outweigh the benefits.

The funding rates for Title II and IDEA 611 & 619 were based on a rough average of the DCPS and DC public charter per-pupil funding levels during the 2012-13 school year. In each subsequent year, we assumed a 3% annual increase.

Other Government Revenues (1% of total school revenues in Year 1.)

In the Other Government Funding/Grants revenue category, we assumed 3% annual increases in the funding per meal from the 2012-13 school year to Operating Year 1 for the National School Lunch Program (NSLP) and Healthy Schools Act (HSA) program, followed by annual 3% rises in subsequent

years. We realize that not every meal that is ordered is actually eaten; this is important to track because every meal that is ordered is a cost but if it's not eaten, then no reimbursement will be available on the revenue side. To account for this, we factored in an 85% consumption rate. Furthermore, for the Healthy Schools Act, we assumed that 75% of the meals will meet the nutritional standards and local food requirements needed in order to receive reimbursement (although the school will strive to ensure 100% compliance with the Healthy Schools Act for all its meals).

Also in the Other Government Funding/Grants category, we included a 50% discount on E-Rate eligible services beginning in Year 2. With a free and reduced-lunch enrollment percentage above 20%, Lee Montessori will be eligible for the 50% E-Rate discount in most years. However, due to E-Rate rules, it is sometimes difficult to receive this full discount level during the first year of operations. Once the school has an operating history, it is easier to prove the FRL percentage and claim the appropriate discount.

Private Grants and Donations

We expect to raise \$10,000 in private gifts in Year 1 and subsequent years, primarily from individual supporters and friends of the school. The \$10,000 annual increase in private funds seems low, but we wanted to maintain the conservatism in the model and thus did not project higher fundraising totals.

As mentioned earlier, the school also plans to apply for a \$250,000 grant through the Walton Family Foundation. While several new charter schools in D.C. have successfully accessed this grant in recent years, we did not want to assume that Lee Montessori would also receive it. Thus, this money was not included in the budget. Obviously, if the school wins the Walton money and exceeds its otherwise very modest fundraising targets, it will dramatically increase the capacity and growth potential of the school and the budget will have to be revised.

Activity Fees

Two activities are included in this line-item: student lunch sales and before & after care fees.

The school will charge a reasonable fee to its paid students to cover the difference between the NSLP reimbursement for paid lunch students and the cost of the meal from its food vendor. We have factored in a 50% collection rate for potential school lunch revenue and expect to generate approximately \$12K in school lunch sales.

The school will also operate a separate extended day program to those families that wish to participate. Fees will be on a graduated scale based upon the FRL percentage of the student.

Other Income

Other Income includes a negligible amount for interest income and a small amount of funds from the sale of uniforms/t-shirts.

Expenses

Note that all expenses include 3% annual cost-of-living/inflation increases for Years 1-5.

Personnel Salaries and Benefits

All budgeted salaries have been benchmarked and are considered to be within the norm of those offered by public charter schools within the region.

- **Principal/Executive Salary:** 2 FTE's in Year 1 – Head of School and Curriculum Director. The Curriculum Director will also serve as a teacher in Year 1.
- **Teacher Salaries:** 4 FTE's with an average salary of \$55,000 in Year 1. As noted above, the school will effectively have 4 teachers in Year 1 with the Curriculum Director serving double-duties. Additionally, in Year 1, we are planning to hire part-time staff as specials teachers (dance, music, P.E.). As enrollment grows, the number of teachers will increase, and the Specials teachers are

budgeted as full-time members of the staff. By Year 5, we project 8 classroom teachers and 4 specials teachers.

- Teacher Aides/Assistants: 3 FTE's plus hourly staff in Year 1 - Extracurricular Director, 2 Teacher Aides, and hourly staff for before & after care. The Extracurricular Director will also serve as an aide in Year 1. The budget for the hourly staff will grow with enrollment in future years.
- Other Education Professionals: 1 FTE in Year 1 – SPED/ELL Coordinator. Beginning in Year 2, we plan to hire a Dean of Students/Family Outreach Coordinator.
- Business/Operations Salaries: 2 FTE's in Year 1 – Operations Manager and Officer Manager. Beginning in Year 3, we plan to hire a Café Coordinator to be responsible for the student meals program.
- Other Staff Salaries: This is a provision for substitute teachers. This amount grows with enrollment in subsequent years.
- Employee Benefits: FICA taxes at 7.65% of total salaries. DC unemployment insurance at 2.9% of the first \$9,000 in each employee's salary. All staff at 0.5 FTE and above will receive benefits (health, 401(k), life and disability insurance, etc.), budgeted at 10% of salaries.
- Contracted Staff: This includes a Board Consultant and consultation fees from the Association Montessori International (AMI).
- Staff Development: The amount budgeted annually for professional development will grow in future years as the teaching staff grows. We have also set aside additional funds in Year 1.

Direct Student Expense

This represents the cost of textbooks, student supplies and uniforms, library materials, teacher computers, student desks and chairs, assessment materials, special education services, student information system, field trips, and student recruiting expenses. All baseline costs were based on the actual expenditures of operating D.C. public charter schools (as compared by EdOps), as well as non-charter Montessori schools. Lee Montessori will have slightly higher costs in this category than the typical charter school due to the Montessori supplies that will be purchased and the cost to receive Association Montessori Internationale recognition. Year-over-year increases reflect an inflation rate of 3%.

To reflect our fiscal conservatism, we have also budgeted for a miscellaneous student costs at \$100 per student as a contingency line-item.

Occupancy Expenses

Lee Montessori expects to be in a Building Hope Incubator site in Years 1-3. As such, its facilities costs as a percentage of the per-pupil facilities allotment will be pre-determined in each of those years. In Years 1, rent expense will be 80% of the per-pupil facilities allotment; in Years 2-3, it will be 90%. This arrangement removes much of the risk associated with fixed facilities costs, since the school will have a rent that adjusts based upon actual (not projected) enrollment. It also means that this is the only Occupancy Expense line-item that will have any relevance in Years 1-3.

In Years 4 – 5, we have assumed that the school will continue to lease space, but will do so at a non-Incubator site. We are assuming a space of 100 square feet per student and rent of \$30 per square foot grown at 3% inflation. Operating expenses (inclusive of the cost to contract for janitorial and maintenance services) are estimated at \$7.00 per square foot and reflect an inflation rate of 3%.

Office Expenses

This primarily represents those expenses that support the business operations of the school. This includes office supplies and materials, office furniture and equipment, copier rentals and maintenance, telephone expense, printing, postage, computer support fees, and legal, accounting, and payroll services. Estimated expenses represent the average amount a D.C. Public Charter School spends on an office expense line item.

To reflect our fiscal conservatism, we have also budgeted for a miscellaneous office expenses at \$50 per student as a contingency line-item.

General Expenses

This represents the cost of insurance, faculty travel, food service fees, staffing recruiting expenses, and authorizer fees. With the exception of the authorizer fees, all baseline costs were based on the actual expenditures of operating D.C. public charter schools (as compared by EdOps). Year-over-year increases reflect an inflation rate of 3%.

To reflect our fiscal conservatism, we have also budgeted for a miscellaneous general costs at \$100 per student as a contingency line-item.

Capital Budget

The school plans to capitalize several assets during its first two years of operation. Capital expenditure is budgeted in four categories: computers and materials, classroom furnishings and supplies, office furnishings and equipment, and renovations/leasehold improvements. The net impact of said capitalization through the end of year two is forecasted at \$97.9K. Funds have been set aside in the capital budget to account for student growth and replacement of assets who have outgrown their useful life.

Computers & Materials includes the cost of laptops and computer peripherals such as printers and monitors. These are budgeted on a per staff basis. The cost of each laptop is budgeted at \$850.

Classroom Furnishings & Supplies includes the cost of all classroom furniture such as student desks + chairs, teacher desks + chairs, and hookshelves. These are budgeted based upon the number of new classrooms in a given year. Each student desk + chair is budgeted at \$150. Each teacher desk + chair is budgeted at \$400. The hookshelves/cabinets are budgeted at \$100.

Office Furnishings & Equipment includes the cost of non-classroom furniture such as office desks, office chairs, and filing cabinets. These are budgeted based upon the number of non-teaching staff. Each office desk + chair is budgeted at \$500. The filing cabinets are budgeted at \$550.

Renovations & Leasehold Improvements is a flat amount that could be used for such things as painting of the building or minor renovations to the space.

Austin Laine Brickler

Education	<p>M.Ed. Primary Montessori Education Loyola University of Maryland</p> <p>Association of Montessori International Certification Diploma Washington Montessori Institute at Loyola University</p> <p>B.A. Film Studies and Production Columbia College, Chicago IL</p>	
Work Experience	<p>Montessori Primary Head Teacher, District of Columbia Public Schools - Marshall Elementary</p> <ul style="list-style-type: none"> • Head classroom teacher in a Title 1 Association Montessori Internationale (AMI) Accredited Program • Collaborate with Montessori staff on curriculum and classroom management • Create and carry out individual lesson plans for each student in accordance to the AMI Montessori curriculum. • Monitor and track student progress using Teaching Strategies GOLD Assessments and Dibels 	<p>8/10-Present</p>
	<p>Upper School Specialty Teacher, Near North Montessori School, Chicago, IL</p> <ul style="list-style-type: none"> • Student Advisor/Instructor for various programs such as the Upper School's Micro Economy, The Joffrey Ballet Residency, Curriculum Extension classes and Junior High Electives • Junior High Girl's Sports Coach 	<p>8/08 – 8/09</p>
	<p>Lower School FT Substitute Teacher, Near North Montessori School, Chicago, IL</p>	<p>8/07-8/08</p>
	<p>Assistant Marketing Director, A and N Mortgage Services, Inc., Chicago, IL</p> <p>Responsibilities include:</p> <ul style="list-style-type: none"> • Maintaining, updating spreadsheets for mass mailings • Recruiting and managing new employees under the supervision of the V.P. of Sales • Creating and editing documents using Photo Shop, Adobe and Microsoft Word programs • Assisting the President of the company with daily personal tasks 	<p>11/06 – 1/08</p>
	<p>Richard M. Daley Campaign Fund - Personal Assistant to Mrs. Maggie Daley Chicago Cultural Center, Chicago, IL</p> <ul style="list-style-type: none"> • Oversaw all communications, marketing and publications regarding Mrs. Daley and the Chicago Cultural Center Foundation • Represented Mrs. Daley on After-School Matters steering committees • Prepared agendas, reports, materials, etc. for The Chicago Cultural Center Board of Directors and After-School Matters Board of Directors meetings • Represented Mrs. Daley during Chicago Cultural Center Board meetings • Made executive decisions on Mrs. Daley's behalf during times of travel and illness • Developed and maintained donor database for The Chicago Cultural Center • Oversaw all recruitment and training of volunteers • Due to confidentiality, more information can be provided upon request 	<p>09/03 – 12/05</p>
Volunteer Experiences	<p>Project Focus, Chicago, IL</p> <p>Student Volunteer, Marquette University, Milwaukee, WI</p> <p>Best Buddies, Marquette University, Milwaukee, WI</p> <p>Summer Camp Counselor, Morgan Park Academy, Chicago, IL</p> <p>Chicago Late Ride, Chicago Park District, Chicago, IL</p>	<p>08/07 - Present</p> <p>09/01 – 05/02</p> <p>10/99 – 05/01</p> <p>Summer of 1998</p> <p>Annual Event</p>
References	<p>Available upon request</p>	

**Lee Montessori Public Charter School
Board Member Agreement Form**

As a member of the Lee Montessori Public Charter School Trustees, I accept the duties and responsibilities set forth below.

Duties and Responsibilities of the Board:

1. Develop, understand, and support the mission and vision of Lee Montessori Public Charter School.
2. Periodically review the mission of the school, to monitor the school's progress in its short and long term strategic planning, setting priorities; both financially and operationally for the school, and as a basis for decision making.
3. Pursue and maintain accreditation through the Association Montessori Internationale (AMI).
4. Establish policies and procedures that maintain compliance with federal, state and local laws as well as supporting the schools mission.
5. Maintain the job description and performance for the Head of School.
6. Recruit, hire, retain, evaluate, (and terminate, if necessary) the Head of School.
7. Strengthen the school's long and short-term strategic goals by providing fundraising support
8. Recruit board members based on needed expertise as well as understanding and support of the strategic plan.
9. Selection and oversight, through the Audit and Finance Committee, of the annual audit of the schools financial records.
10. Participate in the development and monitoring of the schools strategic plan in the areas of student outcomes, fiscal compliance and sustainability, and facility acquisition/financing.
11. Communicate with Family Advisory Council to monitor satisfaction of program's compliance with mission.

Duties and Responsibilities of Individual Board Members:

1. Attend all board meetings; if unable, notification should be provided to the Chair of the Board.
2. Participate on at least one Board committees.
3. Provide wisdom and guidance through interaction at board meetings, including providing alternative perspectives, and acts in concert and supports the unanimous decisions of the board.
4. Develop and accomplish individual fundraising goals.
5. Attend Board of Director training events and Montessori pedagogy workshops.
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7. Avoid or disclose any and all conflicts of interest.
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9. Maintain high level of ethical standing.

10. Make decisions that are consistent with the mission, philosophy, goals, and objectives of the school.
11. Maintain knowledge of charter school environment in Washington and understand the market and climate of issues affecting charter schools.
12. Monitor operational and organizational performance against goals, budgets or key indicators.
13. Ensure that capital and operating budgets are established annually and in a timely fashion.
14. Participate, to the extent requested, in selecting an outside auditing firm to conduct an external audit or review each year.
15. Agree and adhere to Lee Montessori PCS's Conflict of Interest, Articles of Incorporation, and Bylaws.

Read and understood:



Signature

AUSTYN LAWE LEMBERS BRUCKLER 28/FEB 2013

Printed Name and Date

Personal Statement

I, Austyn Laine Brickler, am a founding member of Lee Montessori Public Charter School because I feel strongly and passionately there is a need for excellent public Montessori education in the District of Columbia. As a public school teacher in the District, I have witnessed first-hand and understand the challenges many students face daily in and out of the classroom. These children are our most important resource and as an educator I advocate not just for my students, but all students, every day. I personally feel the Montessori curriculum allows each student to explore their personal interests while gaining the tools they need for academic, social and personal success. I know Lee Montessori Public Charter School will give the children of DC the opportunity to excel academically and reach their highest potential.

My experience as a Montessori teacher in both private and public settings allows me to contribute greatly to the academic success of Lee Montessori Public Charter School. As a founding member, I have worked extensively to develop sections of the education, business and operations plans, created all current print media to market the school, facilitated community events and board meetings, and I have successfully solicited local and national support. I plan to continue to work towards the successful implementation of the Lee Montessori Public Charter School during the planning year and as a staff member of Lee Montessori for Year 1 and beyond.

A handwritten signature in black ink, appearing to read "Austyn Laine Brickler". The signature is written in a cursive style with a long horizontal line extending to the right.

Marimba Johnson Bright

SUMMARY OF QUALIFICATIONS

Educational Professional with more than 14+ years' experience combined with a Masters Degree. Experienced working with diverse cultural backgrounds, ages, special populations, and supplemental programs.

WORK EXPERIENCE

Speech Language Pathologist

9/12 – Present

District of Columbia Public Schools, Washington, DC

Prospect Learning Center

- Provide inclusion services for special needs students in Social Studies, English/Language Arts, and Reading classes.
- Participate in multidisciplinary meetings discussing student progress, speech, language and academic concerns for special education students in grades 6-8.
- Attend parent conferences to discuss child's speech, language and academic progress.
- Develop, implement and evaluate Individualized Education Plans (IEPs) for special education.
- Conduct speech, language evaluations in the areas of articulation, fluency, receptive and expressive language skills for students.
- Assist in decision of eligibility of students for special education services.
- Provide progress notes of students receiving therapy.

Speech Language Pathologist

9/06- 9/12

District of Columbia Public Schools, Washington, DC

Browne Educational Campus, McKinley Technical High School, Washington Metropolitan High School, Elliot Hines Middle School

Speech Language Pathologist

9/00- 9/06

Prince Georges County Public Schools, MD

Kenmoor Middle School/ Fairmont Heights High School

Speech Language Pathologist

9/99- 9/05

Prince George's County Public Schools, MD

Preschool Home Based Speech and Language Program

Consultant Speech Language Pathologist

5/99-1/03

Washington, D.C.

- Conducted speech and language evaluations for persons with developmental delays. Implemented speech and language therapy to mentally challenged adults and children with developmental disabilities.
- Held conferences with parents regarding student's progress.

Speech Language Pathologist

1/99-6/00

Alexandria City Public Schools, Alexandria, VA

William Ramsay Elementary School/ Cora Kelly Magnet School

- Organized and conducted language therapy and evaluations to ages 5-11 years.
- Developed Individualized Educational Plans (IEPs) for children ages 5-11 years.
- Collaborated with Reading Specialist on various reading strategies regarding reading comprehension for children ages 5-11 years.

Speech and Language Pathologist

Alexandria City Public Schools, Alexandria, VA

John Adams Elementary School

- Organized and conducted group therapy sessions and conducted evaluations to preschool children ages 2-4 years with various developmental delays.
- Developed Individualized Educational Plans (IEPs) for preschool children ages 2-4 years.
- Scheduled and conducted therapy sessions with the use of augmentative communication devices.

Speech Language Pathologist

Summer of 1999 & 2000

Alexandria City Public Schools, Alexandria, VA

James K. Polk Elementary School-Summer School

- Organized and conducted speech and language therapy to preschool students aged 2-4 years old.
- Collaborated with classroom teacher to implement therapy and IEP goals. Provided therapy notes and progress notes at end of summer session.

RELATED SKILLS AND EXPERIENCES

- Currently serve on the Founding Board Lee Montessori Public Charter School
- Collaborated with Sexuality Information and Education council of the United States (SIECUS).
- Organized Health Fair in conjunction with SIECUS grant.
- Coordinated the Photo Voice Project with 8th graders under the SIECUS grant.
- Assisted with Food and Friends Service Learning Project for 7th and 8th graders.
- Provided tutoring/mentoring services for the after-school Academic Power Hour program for 2nd through 8th grades.
- Facilitated the organization of Teen Life Club through the Adolescent Prevention Education Program (APEP) for 7th through 9 graders sponsored by the Children's National Medical Center.
- Implemented the Bullying Workshop through the Office of Youth Engagement in the District of Columbia School System.
- Planned Student Advisory weekly sessions for middle and high school students.
- Served on the Alliance for a Healthier Generation Committee for middle and high school students.

EDUCATION

Event Management Certificate

The George Washington University, Washington, D.C
May 2008

Master of Science in Speech-Language Pathology
Howard University, Washington, DC
May 1999

Bachelor of Science in Speech-Language Pathology
Minor: Special Education
Howard University, Washington, DC
May 1995

VOLUNTEER EXPERIENCES

People to People Student Ambassador Program

Delegation Leader

July, 2001 and July, 2003

- Chaperoned and served as instructional leader to middle school students on international travels focusing on educational and cultural interaction.

U-nity Club

Organizer and Co-Leader

Cora Kelly Magnet School for Science and Technology

August 1999 – June 2000

- Mentored and tutored students in social skills, academics and community involvement.

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Read and understood:


Signature

Marimba Johnsons Bright 2-28-13
Printed Name and Date

I, Marimba Johnson Bright, am a founding member of Lee Montessori Public Charter School, because I am a true believer of the Montessori methodology and educational philosophy. I am the parent of a child who has benefitted from the early intervention and teachings of the Montessori program. My daughter has flourished since beginning as a preschooler in the Montessori program. I have witnessed her excel in academics and social skills by interacting with other students of various ages. She has been able to progress at her own rate, and I am so very proud of her accomplishments. I feel that all students should be afforded the opportunity to begin their public education career prior to Kindergarten in order to attain the head start that they need in order to succeed in the educational system.

I have extensive experiences as an educator as a Speech-Language Pathologist within the public school system and will utilize this expertise as a resource to continue to support Lee Montessori Public Charter School. As a founding member, I have participated in the planning of charter application and will continue to provide my expertise by consulting on curriculum, assessment and school culture.

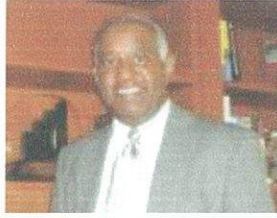
Sincerely,

A handwritten signature in black ink that reads "Marimba Johnson Bright". The signature is written in a cursive style with a large initial "M".

Marimba Johnson Bright

Founding Board Member of Lee Montessori Public Charter School





WILLIE H. DAVIS

President

Davis Executive Associates

For 30 years prior to the establishment of Davis Executive Associates, Mr. Davis applied his entrepreneurial talents to the creation of Birch & Davis Holdings, Inc., a management consulting firm dedicated to helping the management and staff of numerous organizations improve the efficiency and effectiveness of their operations. A graduate of the MBA program at the University of Massachusetts, he began his career with Ford Motor Company in Kansas City. Later, while with the Black Economic Union of Greater Kansas City, Mr. Davis provided assistance to existing and potential small businesses by creating new ventures, conducting feasibility studies, assessing the management capabilities of prospective owners, preparing financial packages, and helping with bank negotiations.

In 1976, Mr. Davis co founded Birch & Davis Associates, Inc., which provided professional services to health care organizations and government agencies. For 23 years, until its acquisition by a large public corporation, he helped lead B&D's impressive evolution from a two-person operation into a multi-component, \$75 Million organization that employed more than 900 people and that provided services in all 50 States and in 40 foreign countries, and to the majority of the federal health initiatives and programs across multiple agencies.

As noted earlier, Mr. Davis began his professional career in the Midwestern United States nurturing aspiring entrepreneurs and promoting community economic development efforts. Throughout his career he has worked in many diverse settings ranging from large multinational corporations to small "storefront" operations in urban communities. He has also directed numerous international projects that have taken him throughout the Caribbean, in sub-Saharan Africa, and as far away as South Africa, where he directed a four-year effort to provide entrepreneurial training to Black South African businessmen striving to survive in an economy dominated by apartheid. Under Mr. Davis leadership, in 1986 B&D created a USAID funded project in Haiti called Centre de Developpement des Ressources Humaines (CDRH).

Mr. Davis has always been keenly aware of the community in which he resides by assisting other small businesses, volunteer efforts, and corporate mentoring. He is also extremely devoted to groups that work with children. He has recently served on the Board of Directors of the Montgomery County, Maryland Boys & Girls Club, The Shepherds Table of Montgomery County, Maryland, the Washington Tennis and Education Foundation, and the International Hospital for Children (World Pediatric Project). Earlier in his career, Mr. Davis served on the board for the Professional Services Council, the National Business League, the Student Business Foundation, and the Small Business Federation. Currently he serves on the boards of the National Capital Area Minority Business Opportunity Center, Men Against Breast Cancer, and The Helene Fuld School of Nursing at Coppin State University, the Coalition of Hope Foundation, and a founding board member of the Lee Montessori Charter School.

In 1999 Mr. Davis was honored in Washington, D.C. and in Palm Springs, California as "*Entrepreneur of the Year*", and he remains committed to community activities addressing youth issues, homelessness, and drug and alcohol problems.

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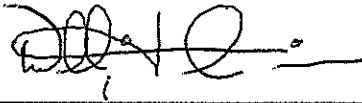
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Read and understood:



Signature

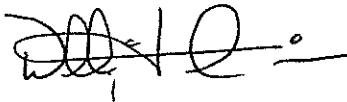
Willie H. Davis 2/27/13

Printed Name and Date

February 27, 2013

As a long time advocate of educational excellence for children of all ages, I am pleased to offer my support as a Founding Board Member of the Lee Montessori Public Charter School, should their application be accepted this Spring. Observing the strengths of the Montessori principles through the education of two grandchildren, it is my belief that this approach presents a unique opportunity for students in Washington, D.C.

I have served on a variety of boards in the metropolitan Washington DC area for over four decades and have strong experience guiding board membership efforts from merely goals to fruition. As a founding member, I plan on contributing my best efforts, through numerous community, government, and social networks to ensure that Lee Montessori School is the best Charter school in the region.

A handwritten signature in black ink, appearing to read "Willie H. Davis". The signature is stylized with a large initial "W" and "H" and a distinct "D".

Willie H. Davis



EDWARD L. FISHER, J.D.

PROFESSIONAL EXPERIENCE

Council of the District of Columbia, Washington, D.C.

Mar. 2008-Present

Chief of Staff – Ward 7 Councilmember Yvette M. Alexander

- Advise the Councilmember on policy, strategy, legislation, budget, and operations.
- Formulate strategies and plans for economic and real estate development projects.
- Meet and negotiate with lobbyists, advocates, corporate entities, the Executive branch and other interested parties regarding legislation and policy matters.
- Serve as spokesperson for Councilmember at public engagements.
- Manage day to day operations and staff of the Ward 7 Council office.

Committee Director – Committee on Public Services & Consumer Affairs

- Provided legislative, policy, budget and programming oversight on all regulatory issues under the purview of the committee. (Agencies include: Dept. of Consumer & Regulatory Affairs, Dept. of Insurance Securities & Banking, Office of the People's Counsel, Public Service Commission, and Office of the Tenant Advocate)
- Met and negotiated with lobbyists, advocates, corporate entities, and other interested parties regarding legislation and policy matters.
- Drafted legislation regarding insurance, banking, and other regulatory matters.
- Formulated and adjusted agency budgets and drafted committee reports.

Legislative Counsel – Committee on Public Services & Consumer Affairs; Committee on Aging & Community Affairs

- Provided legislative, policy, budget and programming oversight on Department of Consumer and Regulatory Affairs and the Office of the Tenant Advocate.
- Provided legislative, policy, budget and programming oversight on D.C. Office on Aging other offices under the Community Affairs umbrella.
- Drafted legislation regarding permits and licensing, building codes, and other regulatory matters.
- Formulated and adjusted agency budgets and draft committee reports.
- Drafted opening statements, comments, and interrogatories for Council hearings.
- Facilitated meetings with advocates, lobbyists, Executive branch staff, and other stakeholders regarding legislative matters and agency performance.

Legislative Director – Ward 7 Councilmember Office

- Advised and directed Ward 7 Councilmember Yvette Alexander on all legislative matters.
- Drafted legislation, resolutions, reports, comments, speeches, interrogatories, and opening statements.
- Drafted memoranda and performed research on relevant legal and policy issues.
- Served as liaison between special interest groups and the Councilmember.
- Served as spokesperson for Council office at public engagements.

Federal Election Commission - Paralegal Specialist, Washington, D.C.

Feb. 2006-Feb. 2008

- Drafted memoranda analyzing legal and factual issues relating to the Federal Election Campaign Act, administrative law and other statutes.
- Conducted legal research using library and online resources.
- Proofread legal documents to identify errors and to ensure the accuracy of citations and quotations.
- Organized, and summarized substantive information and documents on various factual and legal issues.

Office of the Comptroller of the Currency, Department of the Treasury - Legal Technician, Washington, D.C.

Nov. 2004-Feb. 2006

- In both the Litigation and Securities & Corporate Practices divisions, performed legal research on various topics as they related to the national banking system.
- Reviewed legal documents for proper citations, format, and compliance with local rules of relevant court.
- Drafted and edited memoranda to various industry officials regarding banking regulations and actions.

Wiley Rein & Fielding, LLP - Legal Aide, Washington, D.C.

Sept. 2002-Nov. 2004

- Researched and analyzed complex insurance litigation cases in the 5th, 6th, and 7th Federal Circuits that often led to trade association client participation as amicus party.
- Drafted legal briefs to be used as client research tool.
- Cite checked and researched cases using LexisNexis and Westlaw.
- Administered and maintained case files, conflicts document, local counsel billing procedures, extranet website, Lotus Notes Database, licensing agreements, corporate disclosure statement, media alerts, etc.

Washington Wizards/Mystics - Account Executive, Washington D.C.

Mar. 2001-Aug. 2001

- Created and implemented sales strategies that generated ticket sales and surpassed established goals.
- Designed and organized community relations events involving team players and local youth.
- Maintained client accounts and facilitated game night operations such as: corporate marketing promotions, client recruiting, customer service, etc.

SunTrust Banks, Inc. - Branch Assistant Manager, Washington, D.C.

Oct. 2000-Mar. 2001

- Supervised the sales and operations management of branch office.
- Guided all branch staff to achieve sales goals as established by the branch manager.
- Assumed responsibility for achieving and maintaining established loan goals.
- Insured that branch quality standards were followed and that all processes were established to insure the highest level of customer satisfaction and safety of bank assets.

**Office of the Chief Counsel, Finance & Management,
Internal Revenue Service - Intern, Washington, D.C.**

May 1999-Aug. 1999

- Performed fundamental legal research regarding personnel issues.
- Updated procedure memorandums from Chief and Associate Chief Counsels.
- Prepared grievance data and conducted payroll timekeeping.

EDUCATION

The Catholic University of America, Columbus School of Law
Juris Doctorate, January 2005 (Evening Program)
Hampton University, Buckman School of Business
B.S. in Business Management, May 2000 with Departmental Honors

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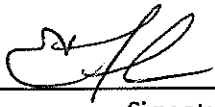
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Read and understood:



Signature

EDWARD FISHER 2-28-13

Printed Name and Date

Personal Statement – Ed Fisher

I, Ed Fisher, am a founding member of the Lee Montessori PCS because I am the parent of a former Montessori student and I believe in the Montessori model as an effective way of teaching children.

My youngest son was a student in a Montessori program in DC Public Schools until he reached the 1st grade. The Montessori program at his school did not allow students to participate beyond kindergarten and he was forced to enroll in a traditional program. I, like many other parents, scrambled to find another Montessori program for my child. My son was on the waiting list for a Montessori program for two years before we decided to stop trying. My son is currently doing exceptionally well in his traditional classroom and I attribute much of his success to his foundation in Montessori.

Access to various education learning models is absolutely important to the success of our children. Montessori must be widely available in all communities in the District of Columbia. The Lee Montessori PCS would give greater access to children who would not otherwise have access. The greater community will benefit by nurturing and honing the talents of our children through Montessori.

Sincerely,



Ed Fisher

DOMINIQUE FORTUNE

BUSINESS DEVELOPMENT PROFESSIONAL

Business Development/Capture Management/ Proposal Management/Market Research/Consultative Sales/Solution Sales

Proven performance exceeding goals in highly competitive markets, within the Information Technology arena. Expertise includes leading business development efforts for a \$240M corporation to include but not limited to; capture contractual agreements, proposal management and pricing. Proven ability to foster relationships through interpersonal skills and enthusiasm. Excellent skills in presentation, training and oral/written communication. Ability to aggressively identify opportunities and perform sophisticated research tasks, with the skills and experience to architect business solutions enterprise wide.

PROFESSIONAL EXPERIENCE

U.S. Investigative Services (USIS)

October 2011- Present

Business Development Manager

- Cultivate and drive new business opportunities from opportunity identification to capture and close- to include; qualification, positioning, competitive analysis, and teaming relationship activities
- Support all lines of USIS' portfolio to include; Global Solutions division, LABAT, and Investigative Services
- Implement procedures within capture development and proposal development
- Regularly present business opportunities to senior executive leadership
- Meet regularly with senior executive leadership on business development strategies and how those map back to USIS' business goals

SOURCEFIRE, INC.

March 2011- October 2011

Regional Sales Manager for Public Sector-Civilian

- Solely responsible for driving all business within six Government Agencies and (15) Independent Civilian Agencies maintaining an annual quota of \$1.6M
- Identified (12) new \$100K + opportunities within account base continuing to build out pipeline
- Identified all key decision makers within account base
- Built cold calling campaign around five agencies
- Meet regularly with C-level government officials & channel partners
- Responsible for presenting the Sourcefire value proposition within an account base

CA TECHNOLOGIES

November 2010- January 2011

Security Sales Executive, Identity & Access Mgmt (ICAM) for Public Sector

- Responsible for driving business within Civilian Government Agencies maintaining an annual quota of \$1.5M
- Attained CA Leader Board status for month of December at 84% of quota in Q3 for North America
- Sold within the Security vertical supporting a suite of (11) Security products around Content Aware Identity & Access Management
- Identified competitive landscapes within agencies around security products
- Identified and utilized all tools within CA for calling campaign to include; Channel Partners, Install Base, CA Support Online, Immix Group and INPUT/FedSources
- Met with Integrators, SB Partners and Channel Partners to discuss teaming arrangements

GARTNER, INC

December 2009- October 2010

Federal Client Partner (Federal DoD & Intel)

- Supported six Account Managers within the DoD and Intel space with a quota of \$6M collectively
- Worked directly with Government executives within the Federal DoD and Intel Sector to solve and support their IT business challenges
- Supported (225) DoD and Intel clients
- Based on Gartner's *Role Based Offering*, identified client initiatives mapping to Gartner's solutions (Key Metric Data, Analyst interaction, Webinars, Activity Cycle, Toolkits, Gartner Business Wizard)
- Exceeded monthly retention and account growth goals

VOLUNTEER WORK

May 2007- Present

Lifting As We Climb Foundation, Inc.

EDUCATION

Graduated May 2005

The College of Charleston- B.A. Communication

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8. Effectively communicate with outside organizations to uphold and enhance the reputation of the school.
9. Maintain high level of ethical standing.

10. Make decisions that are consistent with the mission, philosophy, goals, and objectives of the school.
11. Maintain knowledge of charter school environment in Washington and understand the market and climate of issues affecting charter schools.
12. Monitor operational and organizational performance against goals, budgets or key indicators.
13. Ensure that capital and operating budgets are established annually and in a timely fashion.
14. Participate, to the extent requested, in selecting an outside auditing firm to conduct an external audit or review each year.
15. Agree and adhere to Lee Montessori PCS's Conflict of Interest, Articles of Incorporation, and Bylaws.

Read and understood:

Dominique Fortune DOMINIQUE FORTUNE 2-28-1
Signature Printed Name and Date

I, Dominique Fortune, am pleased to offer my support as a Founding Board Member of the Lee Montessori Public Charter School, should their application be accepted this Spring. I strongly believe in the Montessori principals and recognize what a unique opportunity this is for students in Washington, D.C. I've had the pleasure of witnessing first-hand how exceptional the students coming out of the Montessori program are and how it enables children to excel not only academically but socially. The Montessori philosophy gives children the tools needed to face challenges, problem solve, and think outside- of-the- box.

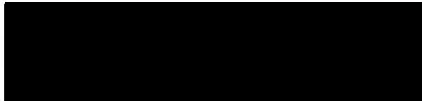
I have experience with community outreach and fundraising, and plan to lend that to Lee Montessori PCS. As a founding member, I worked primarily on community outreach, founding board identification and identification of possible incubator sites. Please, strongly consider Lee Montessori Public Charter for Spring 2013 approval.

Sincerely,

A handwritten signature in cursive script that reads "Dominique Fortune". The signature is written in black ink and has a long, sweeping horizontal line extending to the right from the end of the name.

Dominique Fortune

Founding Board Member of Lee Montessori Public Charter School





Abbey G. Hairston is a member of the Thatcher Law Firm, LLC, in Greenbelt, Maryland. Ms. Hairston has represented public school districts since 1983 in a wide range of matters. She previously served as general counsel for the District of Columbia Public Schools (2006-2007) and as Labor/Employment Counsel and General Counsel for the Palm Beach County Florida School Board (1988-1993). In addition, Ms. Hairston represented the Los Angeles Unified School District (LAUSD) in 2004 – 2006, assisting LAUSD in obtaining modifications to a special education consent decree. Ms. Hairston also served as the Counsel for the Baltimore City Public Schools (BCPS) after the Maryland Legislature enacted the City-State Partnership in 1997. She represented BCPS and Newark, New Jersey Public Schools in special education class action litigation. Ms. Hairston currently represents the Board of Education of Prince George’s County, Maryland, the National Children’s Center, and other non-profit entities on education and business related matters.

Ms. Hairston also represents both management and individual employees in employment matters. Her clients have included corporations, city and county governments, retail and financial institutions. She handles employment discrimination and employment related tort and breach of contract claims in State and federal courts and before administrative agencies and arbitrators. She has negotiated collective bargaining agreements, conducted training for managers and employees; and, counseled clients on the requirements and implementation of laws such as the FMLA, ADA, Title VII and various State employment laws.

In February 1997, Ms. Hairston was named as one of “Washington’s 50 Best Lawyers” by the *Washingtonian* magazine. She participated in Leadership Baltimore – Class of 2001 and was named an Outstanding Lawyer in America in 2003. Most recently in 2012, Ms. Hairston was given an AV Preeminent Rating by Martindale Hubbell Bar Register of Preeminent Women Lawyers. This rating is recognition of women attorneys who have received the highest possible rating in both legal ability and ethical standards from their peers. Less than 5% of women lawyers in the United States have been recognized with such a rating.

Ms. Hairston is active in local and federal bar associations in Maryland and the District of Columbia and is also licensed to practice law in Florida. She is a frequent lecturer on a wide range of topics, including education and employment issues and trial practice. She authored *The Leave and Disability Coordination Handbook*, which was published by Thompson Publishing Group, Inc., in June 1997.

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3. Pursue and maintain accreditation through the Association Montessori Internationale (AMI).
4. Establish policies and procedures that maintain compliance with federal, state and local laws as well as supporting the schools mission.
5. Maintain the job description and performance for the Head of School.
6. Recruit, hire, retain, evaluate, (and terminate, if necessary) the Head of School.
7. Strengthen the school's long and short-term strategic goals by providing fundraising support
8. Recruit board members based on needed expertise as well as understanding and support of the strategic plan.
9. Selection and oversight, through the Audit and Finance Committee, of the annual audit of the schools financial records.
10. Participate in the development and monitoring of the schools strategic plan in the areas of student outcomes, fiscal compliance and sustainability, and facility acquisition/financing.
11. Communicate with Family Advisory Council to monitor satisfaction of program's compliance with mission.

Duties and Responsibilities of Individual Board Members:

1. Attend all board meetings; if unable, notification should be provided to the Chair of the Board.
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14. Participate, to the extent requested, in selecting an outside auditing firm to conduct an external audit or review each year.
15. Agree and adhere to Lee Montessori PCS's Conflict of Interest, Articles of Incorporation, and Bylaws.

Read and understood:


Signature

Abbey G. HAIRSTON 2/28/2013
Printed Name and Date

PERSONAL STATEMENT OF ABBEY G. HAIRSTON

I am a founding member of Lee Montessori Public Charter School because I support the Montessori model and I have been involved in working with school systems and charter schools for over 30 years. As an attorney focused in the practice of school/education law and working as in-house counsel for several public school systems, including the District of Columbia, I am very familiar with the studies and literature regarding the benefits of early childhood education. In addition, in each school district that I have represented or worked with that provide Montessori programs, there is great support for the programs from parents and the general community and usually there are waiting lists of families who desire to have their children enrolled in such a program. In particular, parents appreciate that Montessori focuses on working with individual students in a supportive environment to address their specific needs for learning and achieving.

I am a resident of the District of Columbia. I would very much like to see our public schools and charter schools provide excellent education opportunities for all children in the District. In addition, as a result of my employment with the District of Columbia Public Schools, I am familiar with the data regarding student achievement as well as the requirements for student and school performance established by the U.S. Department of Education and the Office of the State Superintendent of Education. There is a significant need for the District of Columbia to provide early education programs throughout the District for our young children so that they can be adequately prepared to successfully progress through elementary, middle and high schools with more than just barely passing grades.

I am thrilled to be working with a committed and energetic group of diverse individuals who support the Montessori model and want to provide this program for District residents. I am happy to be able to volunteer my time and services to contribute to creating a meaningful learning opportunity for children who live in the District.

Sincerely,



Abbey G. Hairston, Esq.

Founding Board Member

Lee Montessori Public Charter School



Megan Hubbard

Experience

August 2008-Present District of Columbia Public Schools

Primary Montessori Teacher, Thurgood Marshall Elementary

- Lead teacher in a primary classroom with students ages 3-6
- Plan and deliver lessons in practical life, sensorial, language, and math with Montessori materials
- Develop and facilitate parent education workshops on Montessori theory and child development
- Collaborate with early childhood team within Marshall as well as with other Montessori teachers District wide

August 2011-Present

Early Childhood Grade Level Chair, Thurgood Marshall Elementary

- Lead early childhood team of four teachers and four paraprofessionals
- Ensure health and safety compliance with federal Head Start regulations
- Facilitate weekly collaborative meetings and report back to Early Childhood Education department of DCPS
- Participate in DCPS and Head Start focus groups

March 2011-Present District of Columbia Public Schools

Teacher Selector, DCPS Recruitment and Hiring Team

- Participate in training and norming for TLF standards as well as track records for success, response to challenges, ownership of high expectations, and continuous learning
- Evaluate candidates' lessons based on the TLF rubric
- Conduct in person and phone behavioral interviews
- Evaluate data and record of achievement for fast track candidates

Achievements and Training

- Grade Level Chair, Thurgood Marshall Elementary 2011-Present
- DCPS Highly Qualified Educator, 2009-2010
- Member of Recruitment and Selection Team
- GOLD and Dibels Trained
- Second Step School Liaison

February 28, 2013

I, Megan Hubbard, am a founding member of Lee Montessori Public Charter because I believe strongly in the Montessori approach to education. My experience as a primary Montessori teacher in the DC public school system has shown me how successful this unique pedagogy can be not only for its academic benefits, but for the social and emotional values it instills in the District's youngest learners and their families.

While Montessori is not a new concept in the education field, it certainly is not one that is readily available in the public sector. In my current position, I see the growing demand for Montessori schools, especially ones that continue through the later elementary years. I believe that the addition of Lee Montessori PCS to the current charter schools in the District will help fulfill that demand.

As a founder of Lee Montessori PCS I have worked extensively on all aspects of the education, business, and operations plans as well as all other areas of start-up, facilities planning, and marketing. Once chartered, I will continue to serve on the Board of Trustees before eventually transitioning to become an employee of the school.

A handwritten signature in black ink that reads "Megan Hubbard". The signature is written in a cursive, flowing style with a large loop at the end of the name.

Megan Hubbard

Roland D. Kidd Jr.



Consultant/ Community Development

Marketing/ Strategic Planning/ Market Research & Analysis/ Employee Development/ Product & Account Management/ Customer Relationship Management/ Sales/ Branding/ Internet Communications/ Public Relations

Key Skills: Direct working knowledge and communications with staffing and clients at all levels. Recruiting potentially new clients and consistently finding alternative efforts to problem solving. Driving innovative marketing concepts. Accurately analyzing situations in a time effective manner. Developing & presenting compelling presentation material. Ability to perform efficiently against robust deadlines. Working within team environments to focus on tasks at hand.

Education: BS, Marketing, Morgan State University.

Career History

Marketing / Junior Sales Consultant, Kidd International Home Care, Inc, 2009 to Present. Conduct market research to identify target markets within the Washington DC Metropolitan area. Manage existing/ potential client customer relationship databases. Marketing & advertising efforts through newsletters, press releases, and other correspondences. Client & Employee training presentations and informational seminars.

Management Analyst, Defense Information Systems Agency, 2006 to 2009. Member of Information Technology Financial team that implements systems in accordance with Business Process Reengineering. Tracking client & vendor satisfaction through the use of Customer Relationship Management techniques. Developing and conducting trainings for new employees and outside vendors alike. Internal control & Lean Six Sigma team member to make processes more efficient.

Program Analyst, USDA/Cooperative State Research Education and Extension Services (CSREES), 2003-2006. Marketing and Public Relations assistant dealing with print and television media and public informative marketing material. Database management and customer relationship management services conducted. Editorial work on marketing material for global dissemination to clients, partners, and the general public. Track & Analyze demographic data to suggest possible direction of programs to upper management. Agency representative and agricultural trade shows and public exhibit showcases.

Public Relations Assistant, Department of the Air Force, 2003. Worked closely with Base Executives & law enforcement to assist in planning, budgeting, and implementation for Boiling's "National Night Out" community safety event. Gathered & analyzed community data through the use of Microsoft Office Suite programs and reported findings.

Skills/Qualifications/Organizations

Management Experience, Excellent Written & Verbal Skills, Dependable Self Motivator, Highly Creative, Team Dynamic Personality, Microsoft Office, MS Project, MS Dreamweaver, IBM SPSS, Big Brother Volunteer Member in National Capital Area, Board Member/Fund Raising for Washington DC Non-Profit Organizations, Board Member of Morgan State University's Marketing Society

References Are Available Upon Request

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14. Participate, to the extent requested, in selecting an outside auditing firm to conduct an external audit or review each year.
15. Agree and adhere to Lee Montessori PCS's Conflict of Interest, Articles of Incorporation, and Bylaws.

Read and understood:

Roland Kidd

Signature

Roland DeBois Kidd Jr. 2/27/2013

Printed Name and Date

I, Roland Kidd, am a founding member of Lee Montessori Public Charter School because I am a devote believer that education is the singular link between community, educators, and professionals in efforts to mold the future of our children in Washington DC. I have firsthand knowledge of the benefits of the Montessori approach to education as my child has spent her primary years in a public Montessori classroom in Washington DC.

As a founding member I worked on community outreach and establishing partnerships and I will continue to facilitate relationships within the community that further the goals of Lee Montessori PCS. Attempting to strengthen the link between schools and community will be essential in establishing long lasting relationships and building meaningful communication. Moving forward, I will be an active member of the Board of Trustees.

Very Respectfully,

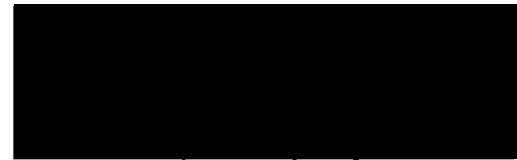
Roland Kidd

Roland D. Kidd Jr.

Founding Board Member of Lee Montessori Public Charter School



SUSAN F. KLINGER



SUMMARY

Financial professional with extensive experience in analysis, forecasting, management, planning, and reporting. Demonstrated ability to clarify and communicate complex issues, work with individuals at all levels of an organization, consistently meet tight deadlines, and construct models which increase the usefulness of financial data.

PROFESSIONAL EXPERIENCE

FEDERAL HOME LOAN MORTGAGE ASSOCIATION, McLean, VA

1998 - Present

Associate Director, Modeling & Methods (2005 - present)

Worked on model oversight, including:

- Revision of the corporate policies and procedures related to model governance
- Design and production of periodic management reports
- Assisted in preparation of business requirements for automated system to document model information
- Served as department representative in the divisional process that reviews new products to ensure model impacts and potential risks are captured and understood

Manager, Operational Risk Management (2004 - 2005)

Worked in Operational Risk Oversight Division on the oversight of the new product process for the corporation, including:

- Revision of the corporate new products policy
- Design and production of periodic management reports
- Coordination with the systems area to develop an automated tool to support the new product process
- Serve as liaison between the business and oversight areas and as subject matter expert

Manager, Planning, Budget, Control & Accounting (1998 - 2004)

Coordinated planning, reporting, and risk assessment functions for the Operations Division within the Single Family Division of Freddie Mac, a financial services company managing \$1 trillion in home mortgages. The Operations Division was comprised of six departments, with a budget of over \$100 million and 650 employees.

Selected Accomplishments:

- Prepared reports for the Board of Directors
- Coordinated a cross-divisional team to quantify the Division's major operational risks for the first time
- Created the Division scorecard and targets for Division performance
- Revised structure and designed summary management reports to more effectively focus discussion at meetings to areas requiring senior management attention
- Developed and maintained cross-functional relationships in order to attain business goals

STUDENT LOAN MARKETING ASSOCIATION, Washington, D.C.

1981-1997

Director, Marketing Planning & Reporting (1991-1997)

Managed forecasting, planning, reporting, and budgeting functions for the Marketing Division of Sallie Mae, a \$50 billion Fortune 500 company. Sallie Mae is the nation's leading education finance company, managing over 40 percent of all student loans outstanding. Produced summary and in-depth analyses for senior and executive level corporate management. Promoted from Manager, Marketing Planning & Reporting. Supervised three professionals.

Selected Accomplishments:

- Analyzed data and developed reports to track product profitability and the corporation's performance against plan and prior periods to support executive decision making
- Composed materials for executive management's presentations to the Board of Directors, securities analysts, and large institutional investors
- Improved the Marketing Division's process for short- and long-range planning by converting manual planning functions to PC-based systems
- Played an integral role in building the financial forecasting/planning function for company which grew from \$6 billion to \$9 billion in annual purchases
- Directed the development, administration, and reporting of the \$30 million Marketing Division G&A budget

Manager, Forecast Planning (1985-1991)

Analyzed the Corporation's business activities and developed forecasting techniques to assess financial statement impact. Promoted from Senior Forecast Analyst. Supervised two professionals.

Susan F. Klinger

Page 2

Selected Accomplishments:

- Designed, developed, and implemented computer-based models to improve speed and accuracy of financial forecasts
- Analyzed corporate performance against business plan objectives
- Evaluated the adequacy of the Corporation's long-term capital structure under risk-based capital requirements
- Developed short- and long-term asset acquisition forecasts, quantified the associated risks, and made recommendations to senior management
- Integrated asset acquisition and runoff projections, alternative economic forecasts, and optimization of the asset/liability mix

Supervisor, Pricing & Cost Analysis (1981-1985)

Managed the yields and pricing function for asset acquisitions and warehousing advances. During this period Sallie Mae purchased over \$4 billion in student loans and loaned over \$6 billion to educational and financial institutions each year.

Selected Accomplishments:

- Developed, documented, and implemented all pricing procedures, tools, and forms for both existing and new products
- Oversaw yield and price calculations for over 1,000 purchase transactions, loans, and forward purchase commitments each year
- Performed sensitivity analyses of standard pricing variables to determine effect on profitability
- Designed and implemented manual and automated data retrieval systems for purchase characteristics
- Interacted with other departments on issues relating to pricing of acquisitions

1979-1981

AMTRAK, Washington, D.C.

Senior Financial Analyst

Planned/analyzed passenger routes and service levels, developed financial portions of the five-year plan, forecast impact of route and service alternatives, and performed cost studies, including those required by Congress and other agencies such as the Department of Transportation.

1979

WGBH EDUCATIONAL FOUNDATION, Boston, Massachusetts

Business Manager

Managed the business office of one of the nation's premier public television and radio stations, prepared financial reports for review by the general manager and trustees, oversaw disbursement of funds and had overall responsibility for grants management, budget administration, government filings, and relationships with outside professional service providers (accounting, banking, insurance).

1977-1978

DEPARTMENTS OF PUBLIC UTILITIES & BANKS, Boston, Massachusetts

Financial Analyst

Worked for the Commonwealth of Massachusetts in the agencies regulating utilities and banking. Analyzed proposed rate increases for electric, gas, water, and bus companies, served as hearing officer for water and bus cases, drafted rate of return sections of final decisions for the Commissioners, evaluated bank expansion proposals (e.g., branch and merger applications), and analyzed bank lending practices, including both supply of and demand for funds.

EDUCATION

Boston University, M.B.A.

Harvard University (Radcliffe College), B.A. *cum laude* in Latin American history

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7. Avoid or disclose any and all conflicts of interest.
8. Effectively communicate with outside organizations to uphold and enhance the reputation of the school.
9. Maintain high level of ethical standing.

Personal Statement: Susan Klinger

I, Susan Klinger, am a member of the founding board of Lee Montessori Public Charter School ("PCS") because I believe in the utmost importance of education, and early childhood is when this process must start if it is to be most successful. My sons had access to an excellent pre-kindergarten program at Murch Elementary School, and I have seen firsthand the impact such programs can have on a child's social and intellectual growth. I also serve on the board of an arts organization where we feel very strongly that access to the arts should not depend on zip code. The goal of Lee Montessori is the same: to provide children in an underserved area exactly the kind of high quality early childhood education my sons had.

My professional experience is in the financial services industry as a financial analyst with extensive work on governance issues. I also served as HSA Treasurer and co-President when my sons were students in DC public schools. I will use the knowledge gained both in my career and as a volunteer to serve as a resource in support of Lee Montessori PCS. As a founding member I will work primarily on finance and governance issues and will continue to consult on these issues during the planning year as needed.

Sincerely,



Susan F. Klinger

Founding Board Member of Lee Montessori Public Charter School



SUMMARY

UNIVERSITY AND K-12 ADMINISTRATOR / FULL PROFESSOR/ / MENTAL HEALTH PROFESSIONAL

Founding Dean and tenured, full professor, School of Professional Studies, at Coppin State University with overall academic responsibility for 10 undergraduate degree programs and 4 graduate degree programs in five departments of study: Applied Psychology and Rehabilitation Counseling, Criminal Justice and Law Enforcement, Social Sciences, Social Work and Interdisciplinary Studies. Former Assistant to the Provost for the Office of Graduate Studies, Director of the Doctoral Program in Educational Leadership and Research Coordinator for the New Male Minority Health Project (NMMHP) at Bowie State University with a dual graduate faculty appointment in the School of Education for the Department of Counseling and the Department of Educational Studies and Leadership. Experienced in teaching graduate research courses, counseling methodologies, theory, and public policy relative to the counseling profession, educational leadership, government and public policy, educational planning and doctoral dissertation courses. Successfully chaired seven (7) doctoral dissertation committees and eighty (80) master's degree theses, Revamped infrastructure of Bowie's doctoral program, designed and provided supplemental research course offerings, coordinated a corporately sponsored dissertation of the year ceremony and graduated the first 26 doctoral students from the first doctoral program at Bowie State University during the first two years as Director of the Doctoral Program, Designed a mentor/ mentee model to engage professors and master's degree counseling students in theses research connecting counseling to public health through the Male Minority Health Project culminating in eight co-authored research articles in five health disparity areas by master degree students and their professor mentors in refereed journals and a monograph. Successfully implemented comprehensive developmental counseling programs in District of Columbia Public Schools, and initiated systemic integration of service learning as an instructional strategy and new venue for completion of community service requirement to successfully implement policy passed by the DC Board of Education. Experienced in design, implementation, and management of professional development institutes and symposia for practitioners based on needs assessments. Awarded nearly \$500,000 in grants during tenure as Director for Community Service and Service Learning Programs, which provided sub-grants of nearly \$100,000 to local high schools for service learning initiatives; and \$60,000 in scholarship monies for DCPS seniors in addition to provision of professional development, technical assistance and supplies and materials to local schools. Accomplished presenter of developmental systemic goals and objectives to national forums. Formal presentations made to 48 states, 2 foreign countries, and 1 United States Territory. Select publications include authorship of 2 book chapters, 4 articles in refereed journals, a national position paper on the elementary school counselor for the American School Counselor Association, 20 articles in national newsletters, 2 booklets; co-authorship of 3 program policy documents for the counseling department of an urban school district; and, author of 4 program documents in service learning. Long-standing reputation for task-oriented, qualitative services to systems and associations. Professional with distinguished record in administration, teaching, counseling, advocacy, programmatic conception and implementation, public relations, inter-professional relations, public policy and legislation, and conference planning.

CORPORATE EXECUTIVE

Demonstrated ability to reprioritize and refocus board policy and management implementation to stabilize a corporation. Ability to manage conflict, promote cooperation and foster a positive public image. Successfully mechanized a professional association for strategic and financial recovery. Secured a \$1.4 million loan to refinance a headquarters building, a \$1 million line of credit to retire debt, and management agreements to strengthen operating procedures.

EDUCATIONAL BACKGROUND:

Ph.D., Counselor Education; Cognate Areas: Education Policy, Planning and Administration - Psychology

University of Maryland, College Park, Maryland -1999

M.A. Guidance and Counseling; Specialty Area: School Counseling

University of Maryland, College Park, Maryland -1974

B.A. Elementary Education

Dunbarton College of the Holy Cross (Magna Cum Laude) -1969

NCC National Certified Counselor

NCSC National Certified School Counselor

LPC Licensed Professional Counselor

PROFESSIONAL HISTORY

FOUNDING DEAN, SCHOOL OF PROFESSIONAL STUDIES COPPIN STATE UNIVERSITY, BALTIMORE, MD 2007-July 2007-PRESENT

Founding Dean and Chief Academic Officer for School of Professional Studies, the largest academic school in the university, with overall academic responsibility for directing and managing the administrative and academic activities of a student population which represents more than one-third of the total university student population. This includes 10 undergraduate degree programs and 5 graduate degree programs in four departments of study: Applied Psychology and Rehabilitation Counseling, Criminal Justice and Law Enforcement, Social Sciences, and Social Work. Overall goals include 1) acquisition of supplemental funding sources to support and enhance academic programs, student opportunities, and professional development opportunities for faculty and staff, 2) recruitment and retention, 3) institutional standardization of school initiatives, 4) undergraduate and graduate faculty: selection and retention, 4) increased external communication and dissemination, 5) increased internal communication and dissemination, and 6) support and advocacy for new undergraduate and graduate degree programs and certifications. Serve on the Provost's Council and participate in all budget, facilities and personnel decisions affecting undergraduate and graduate academic programs in the School.

SELECT ACCOMPLISHMENTS

- Established the Coppin State University School of Professional Studies Study Abroad Program. Initiative consist of the writing of an MHEC approved 6-week 6 credit hour summer course. First country abroad program is Ghana.
- Established "school theme" to promote unity among faculty and staff in conducting School Meeting of all faculty, staff and adjunct faculty with "We Are Family " Theme
- Established all-school orientation for all students, faculty, staff, and adjunct faculty in the School of Professional Studies: 1) to establish sense of school spirit and connectedness, 2) to provide general information and awareness of all support and academic services offered to students by the university to assure academic success. Theme " We Are Family"
- Established multiple communication venues designed to connect students with the School of Professional Studies, scholarship resources, job opportunities, general information to enhance their university experiences: website at www.coppin.edu/professional_studies/ , listserve, Blackboard, E-mail , SPS Informant Newsletter, Face Book Page, *Proficionada* Magazine
- Established monthly meetings for all School of Professional Studies students, faculty and staff to provide specific career, educational, and professional development. Sample topics include: leadership and career planning such as Leadership, Career preparation: resumes and interview skills.
- Hosted inaugural School of Professional Studies Convocation with alumnae from each department as keynote speakers.
- Principal Investigator \$100,000 Department of Justice grant to plan the *Bishop L. Robinson Justice, Sr. Justice Institute* within the Criminal Justice Department of the School of Professional Studies. Planning grant deliverables will enable the School to apply for a \$1 million dollar implementation grant.
- Working toward an international partnership with the University of Addis Ababa in Ethiopia to assist with their production of 5,000 doctorates over the next 10 years.
- Publisher and Editor-in-Chief , *The SPS Informant*, a quarterly newsletter highlighting faculty, student and staff accomplishments from the School of Professional Studies.
- Established the SPS Alumnae Resource Bank,
- Publisher and Editor-in-Chief, *Proficianado*, a bi-annual magazine on the School of Professional Studies.
- Host the "Coppin Connection" radio show once a month on WBAL 1010 AM
- Established the last collegiate section of the National Council of Negro Women established in Dr. Dorothy Height's lifetime. Section established with 88 members.
- Established the School of Professional Studies Student Ambassadors Corp

COMMITTEE ASSIGNMENTS

- Member, University Budget Committee
- Member, University Strategic Planning Council
- Member, Provost's Council
- Member, Global Initiatives Committee
- Member, General Education Committee

**CHAIR, BOARD OF DIRECTORS, AND PRINCIPAL PARTNER
HEALTH INTERNATIONAL, EDUCATION AND PRACTICE PARTNERS INC., 2006 TO PRESENT**

Principal partner in a health and education consultant firm specializing in assessments, planning, evaluation, participatory action research, program design, policy and procedure, and training in the areas of education, public, occupational and mental health. Our principals work with national and international governments, private and corporate agencies, public and private health and mental health facilities and school districts. Select project skills include:

- Design and creation of case-specific implementation models
- Workshop design and employee training
- Organizational and policy assessments, change initiatives, infrastructure design and implementation
- Design and implementation of Train the Trainer models
- Policy and procedural manual development
- Planning, design, and implementation of multi-year strategic for effective service delivery
- Community Engagement and Trans-Field, Trans-Disciplinary Participatory Action Research

SELECT ACCOMPLISHMENTS

- Successful completion of first international contract with African Development Bank inclusive of the production of the deliverables listed below and training in those deliverables in Tunisia over a nine-month period. Deliverables included the following:
 - Co-authored HIV-AIDS Policy, Wellness Program and Social Marketing Plan
 - Development of 14 educational training modules under four general areas: Infectious Diseases (HIV/AIDS, Avian Flu), Healthy Living (Post Retirement, Healthy Eating, Exercise), Life Management (Stress Management, Dealing with Trauma and Life Changes)
 - Production of brochures for each of the educational modules
 - Development of a Resource Manual
 - Production of Health Advisories for 12 African Countries

Client

African Development Bank

- wrote HIV/AIDS Policy, designed Health and Welfare Program, developed a social marketing plan, and developed training materials for Life Management (stress management, dealing with trauma and life changes, balancing work and family) Healthy Living (women's and men's health, exercise and post retirement health) Infectious Diseases (HIV/AIDS, STD's, Avian Flu, Travel Advisories) and Tobacco and Alcohol Control and Prevention. Then completed 2 weeks of training utilizing materials developed.

**ADJUNCT PROFESSOR
ARGOSY UNIVERSITY, ALEXANDRIA, VA, 2011 TO PRESENT**

GRADUATE COURSE TAUGHT

PC6511 ECJ Social and Cultural Foundations

Course includes studies of multicultural and pluralistic trends including characteristics and concerns of diverse groups; attitudes and behavior based on factors as age, race, religious preference, physical disability, social class, sexual orientation, ethnicity and culture, family patterns, and gender. Course designed to sensitize students to the impacts of culture on the counselor's understanding of individuals from diverse backgrounds.

**PAST PRESIDENT, ASSOCIATION FOR MULTICULTURAL COUNSELING AND DEVELOPMENT, 2007=08
PRESIDENT, ASSOCIATION FOR MULTICULTURAL COUNSELING AND DEVELOPMENT, 2006 - 2007
PRESIDENT-ELECT, ASSOCIATION FOR MULTICULTURAL COUNSELING AND DEVELOPMENT, 2005 - 2006**

Representative and spokesperson for the multicultural counseling and diversity agenda for the nearly 500,000 professional counselors across the United States and more than 20 international countries. Responsible for oversight of policy implementation, fiscal planning, organization and governance of the association. Chair and supervise a 20-member governance board. Articulate goals, positions and issues of the organization to the public.

Responsible for assuring that the multicultural counseling agenda is incorporated into the organizational mainstream initiatives and legislation.

2006-2007 PRESIDENTIAL GOALS:

- To recommend and/or connect the national organization with state branches and divisions
- To grow leaders within our organizational structure who are culturally conversant, politically astute, publicly conscious and strategically armed to contribute to the amelioration of deficits within the multicultural agenda within the larger organizational structure
- To ensure the presence of a consistent, conscious and cogent multicultural agenda within the consciousness of the larger organizational agenda which transcends the presence of a multicultural line item
- To engage in preemptive strategies to assure the inclusion of the multicultural agenda

**ASSISTANT TO THE PROVOST
OFFICE OF GRADUATE STUDIES AND RESEARCH
BOWIE STATE UNIVERSITY 2005-2007:**

Responsible for establishing, institutionalizing, training, dissemination and monitoring of all policy, procedural and administrative functions of the Office of Graduate Studies and Research. Responsibilities include assessment of current infrastructure, recommendations for modification and implementation of same. Modifications will provide internal institution-wide consistency, understanding and implementation of all administrative functions of all graduate programs across all schools. Areas under consideration for infrastructure changes and/or enhancements include but are not limited to the following:

- Graduate Admissions
- Recruitment
- Graduate Assistantships
- Tuition Remissions
- Comprehensive Examination Process
- Policy Manuals
- Theses and Dissertation preparations
- Graduate School Program Publications

COMMITTEE ASSIGNMENTS:

Chair, Graduate Council
Member, Provost's Staff
Member, Dean's Administrative Council
Member, Department of Educational Studies and Leadership
Member, Retention Committee
Member, Evaluation Committee

**DIRECTOR, DOCTORAL PROGRAM IN EDUCATIONAL LEADERSHIP
SCHOOL OF EDUCATION, BOWIE STATE, UNIVERSITY 2004- 2007**

Director of the Doctoral Program in Educational Leadership.

Responsible for the direction, administration, admission and maintenance of 60-credit hour doctorate degree training program. Teach 18 credit hours in the doctoral program annually; advise 84 doctoral students and chair six (6) doctoral dissertation committees.

SELECT ACCOMPLISHMENTS:

- Graduated first 16 doctorates in the very first doctoral program of Bowie State University
- Established multiple communication lines with 120 students and doctoral faculty.
- Conducted opening school rally to generate university spirit and rekindle enthusiasm
- Conduct monthly 'All Program Meetings' for all doctoral students and doctoral faculty
- Meet with each of 10 cohorts once per semester.
- Conduct monthly meetings with the doctoral faculty
- Modified and standardized comprehensive exam process and the dissertation defense process and

- Prepared policy and procedures handbook for the doctoral program
- Designed and delivered supplemental courses in the dissertation preparation process
- Creating an infrastructure to facilitate smoother program implementation

COMMITTEE ASSIGNMENTS:

Member, NCATE Curriculum Standards Committee
 Member, BSU Graduate Council
 Member, Dean's Administrative Council

GRADUATE COURSES TAUGHT IN THE DOCTORAL PROGRAM IN EDUCATIONAL LEADERSHIP:

EDAD 713 Educational Government and Political Studies

Course designed to enable educators to become more effective and responsible actors within this web of political relationships that cross between and among schools and universities, educational institutions and their communities, and across levels of government. Course engages students in developing systematic knowledge about their political environment, the skills necessary to act on that knowledge, and the principles that shape responsible political action.

EDAD 711 Educational Planning and Evaluation

Examination and development planning practices and procedures in educational settings. Development of a model plan for a setting of choice. Study of topics related to design and development of educational policies and operations in support of organizational planning. Evaluation of the effectiveness of educational programs and policies in relation to systems theory and analysis of organizations

EDAD 742 Advanced Externship, Clinical Study II

Course designed as an interdisciplinary problem-solving engagement for experienced educational practitioners who are involved in doctoral study while continuing in positions of leadership in education.

EDAD 770 Dissertation II

Course designed to provide individual guidance and support to students writing the dissertation. Individual guidance provided to all students for whom one serves as Chairperson of the dissertation committee. Graduated three (3) of the six (6) dissertations supervised in first year program involvement. Currently supervising/chairing six {6} dissertation committees and a member of 5 other dissertation committees.

EDAD 771-Dissertation Research Advisement

Course designed to provide guidance, technical support and mentoring through the completion and defense of the doctoral dissertation.

ASSISTANT PROFESSOR SCHOOL OF EDUCATION, DEPARTMENT OF COUNSELING BOWIE STATE UNIVERSITY, BOWIE, MD 2000-:PRESENT

Assistant Professor, Graduate School of Education, Department of Counseling. Taught 10 hours of graduate courses per semester, and advised 50 graduate students in both the guidance and counseling and counseling psychology programs. Member of CACREP and NCATE accreditation preparation teams, Project Coordinator Research Component of the Minority Male Health Project, a BSU grant from the Department of Health and Human Services with a consortium of 5 Historically Black Colleges and Universities.

RESEARCH COORDINATOR, BOWIE STATE UNIVERSITY NEW MINORITY MALE HEALTH PROJECT (NMMHP) RESEARCH COMPONENT: 2000-PRESENT

Project Research Coordinator for a BSU grant from the Department of Health and Human Services with a consortium with of 5 Historically Black Colleges and Universities. The goal of the NMMHP Research Component is to conduct professional research, which focuses on best practices for providing counseling prevention, intervention and consulting services in the areas of minority male health in eight health disparity areas. The identified areas are cardiovascular disease, diabetes, hepatitis, HIV/AIDS, hypertension, liver cancer, lung cancer, and prostate cancer. Research teams conduct research from one or more theoretical perspectives relative to counseling minority males 1) to prevent them from contracting diseases associated with one of the eight health

with the disparities. Responsible for the coordination and oversight of 8 graduate professors, 12 graduate students. Designed, implemented and supervised the mentor/mentee relationships of professors and graduate students to complete masters' theses

SELECT ACCOMPLISHMENTS:

- Designed prototype mentor-mentee research model for master's thesis students
- Coordinated year long community based research project of 8 graduate professors and 12 graduate students to complete master's thesis on counseling strategies and implications for 8 health disparities among minority males
- Project deliverables include: 12 master theses, 12 journal articles for publication in refereed journals, 1 monograph for publication, and 3-5 presentations by professors and students at national conferences, symposia and institutes.
- Coordinated research presentation of prototype model and student papers for presentation of NMMHP research at major national conferences: American Counseling Association, Student Adlerian Society, National Symposium on Health Behavioral Change

COMMITTEE ASSIGNMENTS

- Co Chair, School Counseling section of the CACREP preparation committee
- Member, Counseling Standards section of the CACREP preparation committee
- Member, NCATE preparation team for standards on multiculturalism

GRADUATE COURSES TAUGHT IN THE DEPARTMENT OF COUNSELING:

PSYCH 503.191 MENTAL HEALTH IN YOUNG CHILDREN AND ADULTS.

An integrated study of the interaction of human behavior, learning and the environment. Emphasis is placed on (a) the symptoms, causes and remediation of deviant behavior among children, adolescents, and young persons, (b) the role of theory in providing frameworks for remediation, (c) trends and practices in community mental health, (d) visits to human rehabilitation institutions for practical observation of clients' organization, and methods of therapy used, (e) instruction in the writing of a case study.

GUCO 561.191 GRADUATE SEMINAR IN GUIDANCE AND COUNSELING.

Course designed to provide instruction, guidance and assistance in the preparation and writing of the master's research thesis. Course also focuses on a review of relevant literature on current trends, issues and problems in Guidance and Counseling, use of appropriate research procedures and use of the SPSS statistical package. Supervised over 100 Master's Degree theses over the last 6 semesters. Supervised 26 Master Degree students in spring 2002 and 24 students in fall 2002.

GUCO 508 CAREER DEVELOPMENT AND COUNSELING.

Course designed to provide graduate students with an understanding of career development as it impacts individuals throughout the life span. A basic assumption of the course is that understanding the adjustment of individuals is highly dependent upon understanding the choices they have made throughout their lives. Emphasis is placed on career and vocational choice theories, delivery systems, career information, and socio-psychological factors in career decision making. Occupational classifications systems are covered. Emphasis is also placed on practical application of theory to counseling, group guidance, job search, job placement, and career adjustment.

EDUC 507.192 ADVANCED HUMAN GROWTH AND DEVELOPMENT.

Course designed to provide graduate students with an understanding of advanced human growth and development from various theoretical frameworks. Emphasis is placed on the study of the characteristics of human growth at each stage of development with special emphasis on the implication for education and counseling. Practical work in the study of children, adolescents and/or youth is required. Instruction and practice in the writing of a child-study report is also given.

GUCO 507 RESEARCH ADVISEMENT.

Course designed to provide guidance, technical support and mentoring for students completing the Master's Thesis or Seminar Paper.

GUCO 840 COUNSELING CHILDREN AND ADOLESCENTS

Course intended to provide students with a base for working with children and adolescents who receive

history, cultural competencies, attitude and environment. Developmental techniques and strategies for counselors, communication styles, research, assessment, and needs of special populations are also discussed.

PRESIDENT AND CEO

COUNSELING AND TRAINING SYSTEMS, INC. 1995 – PRESENT:

A psycho-educational consulting firm specializing in training and education, counseling prevention and intervention services, professional development and self enhancement workshops, systemic integration of new programs and policies, trouble-shooting, conference planning and facilitation, educational program development, community engagement and networking, asset mapping, diversity planning and training, public relations, mental health and public health care policy, advocacy, legislation and planning, editing and professional/technical writing, proposal/prospectus preparation, research and program evaluation and assessment, and motivational speaking.

CLIENT LIST (PARTIAL):

Over the last ten (10) years consultation and or services have been provided for the following:

- Corporation for National and Community Service
- D.C, Department of Health
- Learn and Serve America – Western New York –Region 1
- George Mason University
- Close Up Foundation
- University of North Texas
- The College Board
- Canisius College Buffalo, New York
- Illinois Counseling Association
- DeKalb County School District, SC
- Arlington County Public Schools
- North Dakota State College
- Montgomery County Public Schools
- Richland County School District, South Carolina
- North American Association for Environmental Education
- Martinsburg School District, West Virginia
- Virginia Commonwealth University
- Morgan State University Center for Health Behavioral Change
- Association for Multicultural Counseling and Development

**SENIOR FELLOW AND CHAIRPERSON, CURRICULUM AND RESEARCH PRODUCTS
NATIONAL CENTER FOR HEALTH BEHAVIORAL CHANGE, 2003- 2004**

Senior Fellow with National Center for Health Behavioral Change. Goal of the Center is to engage in scholarly research, produce curriculum materials, and encourage social marketing for practitioners in the public health arena.

CO-CHAIRPERSON, RESEARCH COMMITTEE, 2001 - 2002

MEMBER, HBCU RETENTION TASK FORCE AND SUMMIT ON RETENTION, 2002 –2003

Member of a task force of HBCU's that collaborate around major issues relative to retention at Historically Black Colleges and Universities. The Research Committee is newly established as of 2002 to do the following: 1) establish an electronic PC based research data information system available to member organizations and individuals. The data information system will focus on retention research on African Americans and People of color. The system may "hot-link" other data systems and services as well; 2) Review research papers given at the annual HBCU Summit for potential publication in the proceedings and/or other publications; 3) Provide technical assistance for researchers conducting retention topics with some emphasis on those in beginning dissertation stages; and 4) explore the feasibility and need for an African American and People of Color Retention Research Journal.

ADJUNCT PROFESSOR

UNIVERSITY OF NORTH FLORIDA FOR UNIVERSITY OF BELIZE, CENTRAL AMERICA, SUMMER 2003

MHS 6006: Introduction to the Counseling Process. Course designed to provide an introduction to the counseling

implementation, and the need for cultural competence. Students learn and practice communication skills, conduct problem-solving exercises using theoretical frameworks with appropriate strategies, and prepare a proposal for a developmental counseling program.

COMMISSIONER

DC COMMISSION ON NATIONAL AND COMMUNITY SERVICE, 1999 –2002:

Serve as an appointee of the Mayor representing the Superintendent of DC Public Schools as the State Education Agency for the District of Columbia. Responsible for the following: 1) Understanding the ethic of service, including its history, and seeking to create its future through visionary discourse, 2) Building relationships and effective advocates for service inside and outside of the state at local, regional, and national levels, with strategic stakeholders, the mayor's office, potential partners, and key decision-makers, 3) Creating sustainable infrastructures for service by encouraging collaboration, attaching service to resources, establishing service as a powerful method of achieving essential goals and strengthening citizenship; 4) Implementing federal policy to draw on the opportunities of policy to create complimentary state policy initiatives which will advance service as a strategy to strengthen communities within state frameworks; 5) Participating in effective decision-making practices within the Commission, including program funding and policy decisions; 6) Overseeing programs that themselves exert programmatic and fiduciary responsibility; 7) Acting as effective and strategic partners in resource development; and 8) role-modeling effective and meaningful youth leadership and participation.

DIRECTOR, COMMUNITY SERVICE/SERVICE LEARNING PROGRAMS DISTRICT OF COLUMBIA PUBLIC SCHOOLS, 1994-2002

Responsible for systemic coordination of District of Columbia Board of Education mandated policy of 100 hours of community service for high school graduation. Monitored 17 coordinators in 17 comprehensive high schools. Recruited, hired, trained and supervised 27 AmeriCorps*VISTA members to work in collaboration with high school service learning programs. Initiated system efforts to assure every student had equitable access to service opportunities. Liaison between DCPS, its departments, outside agencies and the Corporation for National Service. Oversaw local and federal community service and service learning programs; developed, wrote and monitored grants; conducted trainings, seminars, institutes, and network opportunities for agencies and corporations wishing to work with D.C. Public Schools; coordinated and provided technical assistance to schools, community-based organizations and grantees. Directed systemic initiative to infuse service requirement into K-12 curriculum through Service Learning, a standards and performance-based educational strategy. Established systemic infrastructure, priorities, and inter-professional ties and linkages.

SELECT ACCOMPLISHMENTS.

- Conference Chair, 3 annual DCPS Service Learning Fairs for 1000 students. Featured student speakers, 20 educational workshops on community issues co-led by community-based organizations and Service Learning Youth Council Members, 7 concurrent service projects, 80 interactive exhibits, community hero awards, service awards and student scholarships for outstanding service. Planned and implemented first-ever DCPS Service Learning Fair, SY 2000.
- Awarded over \$ 500,000 in grants from Corporation for National Service to infuse Service Learning into the DCPS curriculum through venues such as training and resource materials.
- Participant in \$30,000 grant over 3 year period with the Vermont Department of Education to conduct local assessment study group, develop authentic assessment tools and or processes for service learning, and participate with a national assessment study consortium of six states.
- Awarded \$3500 in grants from Kellogg Foundation to train peer facilitators in service learning.
- Initiated corporate and business orientation programs for agencies involving DCPS students in community service initiatives.
- Coordinated DCPS participation of 1000 students in Mayor's Youth Summits.
- Completed and submitted report on DCPS participation in Mayor's Youth Summit to the Mayor.
- Established DCPS Service Learning Youth Council with representation from every senior high school to provide systemic initiatives and sustain systemic youth voice relative to service. .
- Coordinated system-wide DCPS involvement in the National Youth Service Day in which an estimated 3 million students across the country participated-
- Maintain contact and close, productive working relationship with federal agencies, community based organizations, and businesses in support of D.C. Public Schools.
- Design and/or coordinate systemic and local community service opportunities.
- Provide technical/program design assistance to agencies and organizations to assure program initiatives in compliance with DCPS toward service learning and program standards of quality-
- Drafted policy statement and supportive research paper for DCPS Service Learning Policy.
- Network with school/community based initiatives & corporation grantees across United States.

- Member, National Organization for Fetal Alcohol Syndrome (NOFAS) Board for the District of Columbia.
- Coordinate Trainer of Trainer sessions for Youth as part of service learning initiatives to have teens share information about alcohol and pregnancy.
- Coordinate Teen Summits on Alcohol and Pregnancy.

**ADJUNCT PROFESSOR
TRINITY COLLEGE, WASHINGTON D.C. 1995-2002**

EDU: Incorporating Service Into Curriculum through Standards, Performance- Based Educational Strategy. Practical application, processes and strategies for implementation. Course designed to incorporate the mandated DCPS community service requirement into the curriculum through service learning as an educational strategy; and, to design sample service learning projects specific to professionals' curricular areas. Two-credit graduate course taught off-campus.

**PAST PRESIDENT, AMERICAN COUNSELING ASSOCIATION, 1994-95
PRESIDENT, AMERICAN COUNSELING ASSOCIATION, 1993-94
PRESIDENT-ELECT, AMERICAN COUNSELING ASSOCIATION, 1992-93**

Representative and spokesperson for the nearly 300,000 professional counselors across the United States and more than 50 foreign countries. Responsible for oversight of policy implementation, fiscal planning, organization and governance of the association. Chaired and supervised 25-member governance board. Articulate goals, positions and issues of the organization to the public, provide legislative testimony and promote linkages and liaisons with appropriate internal and external agencies and entities in the public and private sector

SELECT CORPORATE ACCOMPLISHMENTS

- Management and oversight of organization through most tumultuous year of its history.
- Implemented three-pronged approach to achieve financial security, stability and independence.
- Secured \$1.4 million loan to refinance headquarters building.
- Secured a \$1 million credit line to retire debt.
- Pursued aggressive strategies to cure cash flow problems.
- Hired new executive director.
- Effected management agreements to strengthen operating procedures.
- Instituted formal training (in lieu of orientation) for Governing Council (board of directors).

SELECT ACCOMPLISHMENTS RELATIVE TO PROFESSIONAL ISSUES

- Initiated first ACA sponsored convention forum on racism and sexism. Initiated resolutions for implementation on diversity/ cultural sensitivity.
- Maintained national presence as the professional organization for professional counselors. Initiated inter-professional collaborative with mental health professionals in South Africa via General Holomesia, Ambassador Schwartz, and the South African Vocational Guidance and Educational Association.
- Formally initiated inter-professional relationship with the International Roundtable for the Advancement of Counseling (IRTAC).
- Signed contract between ACA and the American Red Cross to involve professional counselors in disaster relief all over the world. Included free training for certified and licensed counselors.
- Maintained a strong presence on and support for the Mental Health Subcommittee to ensure equitable access to appropriate mental health services provided by certified professionals as a guaranteed benefit of any new health care reform.
- First time ever participation of ACA in 3 of the national Black Family Reunions sponsored by the National Council of Negro Women.
- Invited to submit a formal application for ACA admission to the United Nations Educational, Scientific and Cultural Organization (UNESCO).
- Implemented first ever ACA free personal/professional development workshops for the citizens in the convention city (Minneapolis and St. Paul).
- Formalized inter-professional collaboration with Canadian Guidance and Counseling Association.
- Declared war on violence at opening "town meeting" session of annual convention highlighting counselors' role in working with a violent society.
- Joined Coalition for Goals 2000, Inc., along with more than 300 other agencies.
- Sponsored with USA Today and the Coalition for Goals 2000, the "Planning for Life: Career Planning