

## **.02 School Enrollment Projection**

- 1. Grade Configuration: Explain the rationale to serve grades K-6 when surrounding schools in the proposed target areas have K-5 elementary schools and 6 – 8 middle schools. Describe any challenges this might pose to students and families.**

**Response:** Sixth grade students are at a critical developmental and transitional period between adolescence and pre-teen/teenage years. Many sixth graders are not yet equipped to successfully socialize and perform in an environment with seventh and eighth graders. Cook, MacCoun, Muschkin, and Vigdor (2008), in a study titled, “The Negative Impacts of Middle School in Sixth Grade,” details that sixth graders in a middle school setting are 1) much more likely to experience discipline problems—and persists through ninth grade—and 2) perform lower on tests. The researchers strongly argue for sixth grade to remain in elementary school.

Breiman and Coe (2016), in a report titled, “Why Sixth Graders Should be in a Montessori Upper Elementary Program,” cited findings that support that:

...a student’s sixth-grade year in a Montessori program should be in an Upper Elementary classroom. Experiencing the mastery and leadership possibilities of the final year in the 3-year cycle of Upper Elementary is a significant opportunity for children to consolidate strengths they have developed. Being “known” (by teachers and peer groups) and feeling safe and challenged helps these young people in the construction of their strongest selves. In their communities and within the framework of the broad and deep Montessori curriculum, students practice effective self-expression based on self-awareness and appreciation for their own individual gifts and quirks. This healthy experience of personal power is a great solidifier of the self and a bolster for facing the challenges of the next plane of development. The wisdom of the 3-year cycle, that opportunity to move from first-year newbie to second-year experienced to third-year mentor in all areas —social, emotional, academic — while building on previous experiences, applying previous knowledge, and seamlessly moving into new levels, is one of the most effective and successful elements of a Montessori program. It is especially true for children in their tween years, since few children develop at the same rate in both social and academic realms.

We suspect that the challenge for students and families would be that they may perceive the transition to middle school in seventh grade to be difficult since they would know the school and classmates less (they were not part of the sixth-grade middle school cohort). However, we argue and the research would support, that by attending SMS, a primary school, students will be more successful in this transition in seventh than sixth grade, because students will be more emotionally mature and have been provided strong academic, social, and behavioral supports. We understand that what research shows and what we intuitively believe as teachers and parents do not always align. Therefore, the challenge for SMS will be to assist

parents in understanding the benefits of the complete cycle of a Montessori education and to assist with the transition to 7<sup>th</sup> grade. Please see the response under Student Recruitment and Enrollment for specific thoughts on how this will be addressed with parents.

#### References

Breiman, R. & Coe, B. (2016). Why sixth-graders should be in a Montessori upper elementary program. *Montessori Life*, p. 47-48.

Cook, P., MacCoun, R., Muschkin, C. & Vigdor, J. (2008). The negative impacts of starting middle school in sixth grade. *Journal of Policy Analysis and Management*, v. 27, no. 1, p. 104 – 121.

### **1.1 Executive Summary**

#### **2. On page 13, under Prospective Partners, the application lists First State Montessori Academy as a partner. Describe the nature of the partnership.**

**Response:** First State Montessori Academy and Sussex Montessori School expect to continue the informal partnership already established between the two schools. First State Montessori Academy has been supportive of Sussex Montessori School sharing information on how they have handled processes, sharing curriculum, and offering tours of the school to Sussex County residents when requested. Going forward, the Head of Schools may identify opportunities for joint work between staff, boards, etc. that would benefit both schools. Please see the letter of support from the FSMA Board in Attachment 1.1 Executive Summary.

### **1.3 – Education Plan**

#### **Curriculum and Instructional Design**

#### **3. Address curricula deficiencies for Science, Visual and Performing Arts and Health (see page 6).**

#### **Response:**

Science - Sussex Montessori School (SMS) signed the Delaware Science Coalition MOU which was an option in lieu of submitting a full Science Scope and Sequence. In order to illustrate the interdisciplinary nature of the Montessori Curriculum with the Coalition Science Kits, SMS submitted an interdisciplinary curriculum map. This map was not required; however, we view it as a tool to assist teachers as they align the Montessori Curriculum and Delaware State Content Standards. The map is currently based on the curriculum map developed for First State Montessori Academy in 2012. As a result, the map does not reflect the Next Generation Science Standards (NGSS). We understand that prior to Sussex Montessori School opening, this map will need to be fully aligned to NGSS. There are many ways that the Montessori Curriculum naturally supports the NGSS standards and ways that a focus on the NGSS

standards will enhance the experience in Montessori classrooms. For further explanation of the plan to revise the document submitted in the original application please see attachment Science Curriculum Plan.

Visual and Performing Arts - SMS sought technical assistance from the Educational Associate for Visual and Performing Arts in the Delaware Department of Education. The new Visual and Performing Arts standards allow for a smooth integration of the visual and performing arts with the Montessori Cultural Curriculum which focuses on 5 impressionistic lessons: The Coming of the Universe and the Earth, The Coming of Life, The Coming of Human Beings, The Story of Writing and the Story of Numbers. SMS has created interdisciplinary units stemming from these broad lessons. Each of these units is enhanced by the integration for the Visual and Performing Arts Standards focusing on Creating, Performing/Presenting/Producing, Responding, and Connecting. With this in mind, we are replacing attachments 4F - Music, 4G- Visual Arts, and 4H- Dance and Theatre with attachment 4M Interdisciplinary Visual and Performing Arts. We look forward to continued work with the Educational Associate for Visual and Performing Arts as the teachers and SMS explore the full integration of the arts in the daily life of the classroom.

### Health

14 DE Admin. Code 851 includes the following requirements relevant to the SMS health curriculum:

1.1.3 The use of the state content standards for health education for grades K to 12 to address the core concepts: tobacco, alcohol and other drugs, injury prevention and safety, nutrition and physical activity, family life and sexuality, personal health and wellness, mental health and community and environmental health with minimum hours of instruction as follows:

1.1.3.1 In grades K to 4, a minimum of thirty (30) hours in each grade of comprehensive health education and family life education of which ten (10) hours, in each grade, must address drug and alcohol education.

1.1.3.2 In grades 5 and 6, a minimum of thirty five (35) hours in each grade of comprehensive health education and family life education of which fifteen (15) hours, in each grade, must address drug and alcohol education.

With respect to drug and alcohol education specifically, as well as tobacco education, in our submitted Attachment 4I - Health Curriculum, we noted that we would use the National institute for Drug Abuse program (Brain Power) to encourage healthy attitudes toward alcohol, tobacco and drugs use to be delivered by the school nurse and counselor. We have now added the full scope and sequence of the NIDA Brain Power curriculum for grades K-1, 2-3, 4-5, and 6-9 to demonstrate that the requirements 1.1.3.1 and 1.1.3.2 of Code 851 will be met, which is documented in our Attachment 4I - Health Curriculum (Revised).

With respect to injury prevention and safety, nutrition and physical activity, family life and sexuality, personal health and wellness, mental health and community and environmental

health, we note that our submitted health curriculum included injury prevention and safety, nutrition and physical activity, personal health and wellness, and community and environmental health, as consistent with the Delaware Health Education Learning Outcomes (<https://www.doe.k12.de.us/site/handlers/filedownload.ashx?moduleinstanceid=1076&dataid=2349&FileName=DE%20HE%20Learning%20Outcomes.doc>). We have now cross-checked the curriculum against the Scope and Sequence of Health Concepts ([https://www.doe.k12.de.us/site/handlers/filedownload.ashx?moduleinstanceid=1097&dataid=2471&FileName=Scope\\_Sequence\\_of\\_Health\\_Concepts.doc](https://www.doe.k12.de.us/site/handlers/filedownload.ashx?moduleinstanceid=1097&dataid=2471&FileName=Scope_Sequence_of_Health_Concepts.doc)), and added topics at the appropriate grade levels where they were missing to **Attachment 4I - Health Curriculum (Revised)**.

### Special Populations and At-Risk Students

#### 4. Address concerns regarding 12-month services (see page 6).

**Response:** Sussex Montessori School, based on feedback from CSAC and additional research, has revised the plan regarding 12 month and ESY programs to ensure compliance with the following:

- ✓ State law sets a minimum number of hours of school attendance districts must provide for students each year, and the minimum length of the school day. 14 Del. C. § 1049(1)
- ✓ State law also requires that programs be conducted on a 12 month schedule for students with autism, TBI, deaf-blindness, orthopedic impairment, severe intellectual disability, and moderate intellectual disability. 14 Del. C. §§ 703(e) and (f)

Special education and related services will be provided to a student with a disability beyond Sussex Montessori School's normal school year in accordance with the student's IEP, based on the determination of the IEP team and at no cost to the student.

Decisions about which students will be eligible for these programs will be based on the student's unique needs and the goals and objectives in the IEP. The IEP team will determine whether the services are necessary to provide the student with FAPE.

Currently there is no plan for a widespread summer school program but if one were to be developed in the future a child who is entitled to ESY or a 12-month program may participate in that broader program provided it meets the individual needs of the student. The IEP team will consider the Least Restrictive Environment for each eligible child. However, Sussex Montessori does not intend to create a more widespread program simply to provide a peer group of students without disabilities during the summer months.

Transportation will be provided at no cost to any children entitled to ESY or 12 month programs and the IEP team will decide the setting for the services to be provided. The IEP team will consider the following Guiding Questions when making a determination about ESY:

- (1) Degree of Impairment: Without ESY services, will the student achieve appropriate and meaningful progress on IEP goals and objectives?
- (2) Regression and Recoupment: Without ESY services, will the student experience significant regression and recoupment?
- (3) Breakthrough Opportunities: Without ESY services, will the attainment of a newly acquired critical skill be significantly jeopardized over the summer break?
- (4) Other Circumstances: Are there other special or extenuating circumstances to justify provision of ESY services to meet FAPE requirements?

In the standard prior written notice that goes out to parents before IEP meetings it will be explained that ESY/12-month programs would be discussed and the rationale for any decisions to be made around eligibility would be shared. The IEP team will document their consideration of ESY and the rationale for any decision made regarding each child's eligibility.

As stated in the regulation above, the "normal school year" for students identified with autism, TBI, deaf blindness, orthopedic impairment, severe intellectual disability, and moderate intellectual disability is a 12-month year. Students eligible for 12-month programs may also be eligible for ESY as a result of their unique needs.

For every student enrolled in a 12-month program, the IEP team will consider and determine whether the student needs ESY based on degree of impairment, regression and recoupment, breakthrough opportunities, vocational opportunities and other extenuating circumstances.

References: [http://www.wrightslaw.com/law/caselaw/case\\_esy\\_reusch\\_fountain.htm](http://www.wrightslaw.com/law/caselaw/case_esy_reusch_fountain.htm)

##### **5. Provide clarification regarding Instructional Support Team (IST) and Individualized Education Program (IEP) team (see page 6).**

**Response:** Sussex Montessori acknowledges the lack of clarity in the initial response. The following narrative is intended to better articulate our understanding of the role of the IEP and IST teams.

Grade-level/staff teams will meet bi-monthly to discuss student progress and identify any student who may be struggling academically, socially, emotionally, or behaviorally. The team notifies parents of concerns and the team proceeds to use all available information to develop, implement, and/or revise interventions for a minimum six-week period intended to determine if a child is adequately responding to intervention. A thirty minute time period is built in to each school teacher's daily schedule to allow for intervention. Data will be gathered on the intervention and its outcome by the teacher. Teachers also have access to consult with the Instructional Support Team (IST) during the problem-solving process and intervention implementation process. If the student does not demonstrate adequate progress despite intervention, if all regular education staff and resources have been exhausted, and if a disability is suspected, an administrator or teacher will then complete the IST Referral form as part of the Special Education referral process.

Team members include the school Principal, Nurse, School Psychologist, Counselor, Speech and Language Therapist, Teacher and Special Education Teacher. The IST discusses students who are experiencing significant academic, social, emotional, or behavioral struggles as requested by grade-level teams or teachers, as well as new requests for a Special Education evaluation.

1. The status of annual plan reviews and in-progress evaluations are also discussed.
2. Teachers are informed of the IST process for requesting Special Education assessment via building faculty meetings. Teachers and administrators have access to IST Referral forms in designated locations in the school mailrooms.
3. Once a teacher has completed a referral form, it will be submitted to the Principal who will review the information and, upon determining the information provided is sufficient, will forward the referral to the school Special Education staff person.
4. The Special Education staff person will disseminate copies of the referral form to appropriate IST members, based on the area of concern related to teacher expertise. The due process secretary will also invite the referring teacher and any other necessary staff to the next scheduled IST meeting.
5. The IST will consider and review the referral and, based upon all existing information, will determine if a Special Education evaluation is warranted or if more information is needed for making such a determination. The IST will provide written notification to parents of the team's decision.
6. The IST will follow timelines and procedures for conducting Special Education evaluation as outlined by the Federal Individual's with Disabilities Education Improvement Act (IDEIA 2004) and Delaware Regulations.
7. If a child has been referred for a special education evaluation and the parent/guardian provides permission to evaluate, Sussex Montessori will have 45 school days, or 90 calendar days, whichever comes first to convene an IEP meeting and discuss the findings.

#### **6. Provide clarification regarding process for IEPs and 504 plans (see page 6)**

**Response:** Sussex Montessori School, based on CSAC's feedback, submits the following information to clarify our understanding of IDEA and 504 plan requirements.

A 504 provides services and changes to the learning environment to ensure a child with a physical or mental impairment is able to access the curriculum to the same degree as a child without impairment(s).

An IEP provides individualized special education and related services to meet the unique needs of the child with a disability.

To qualify for Section 504's antidiscrimination provisions students must:

- Have a physical or mental impairment that substantially limits one or more major life activities
- Have a record of such impairment
- Be regarded as having such an impairment

To be eligible for a 504 plan, there are two requirements:

1. A child has any disability, which can include many learning or attention issues.
2. The disability must interfere with the child's ability to learn in a general education classroom. Section 504 has a broader definition of a disability than IDEA. (It says a disability must substantially limit one or more basic life activities, such as learning.) Some children who do not qualify for an IEP might still be eligible for a 504 plan.

To be eligible for an IEP, there are two requirements:

1. A child has one or more of the 13 specific disabilities listed in IDEA. Learning and attention issues may qualify.
2. The disability must affect the child's educational performance and/or ability to learn and benefit from the general education curriculum, leading to the need for specialized instruction.

As you will see in another section of Sussex Montessori's responses to the CSAC feedback there has been a significant increase in the number of Special Education staff from .8 to 2 FTE in the first year and increasing numbers as the enrollment increases. In year 1, the Education Director will be responsible for 504 plans. Beginning in year 2, SMS will hire a full-time counselor. This person, under the supervision of the Education Director will be responsible for 504 plans. The Special Education faculty will also report to the Education Director.

References: <https://www2.ed.gov/about/offices/list/ocr/docs/dcl-504faq-201109.html>

**7. Provide clarification regarding student identification process through Child Find. Expand on this section to demonstrate a stronger understanding of the Child Find process and that it encompasses more than students with learning disabilities.**

**Response:** Child Find is the process of locating, identifying and evaluating all students 3 years of age, but less than 21 years of age, who may be in need of special education and related services. Parents/Guardians of children not currently attending public schools can contact local public schools to request an evaluation if they, or another provider who works with their child (doctor, day care provider, etc.), has noticed a potential delay as compared to others in the same age group. A team of qualified professionals from SMS would then review all available information, including input from the parents and interventions implemented, to determine if a child who is having academic, behavioral, communication, or health problems is suspected of having a disability. If deemed necessary, SMS would then conduct screenings in

all of the areas of concern. Further evaluation and interventions would be discussed with any family whose children exhibit delays on the initial screenings.

If it is determined that a child needs special education or related services (speech, OT, etc.) SMS would work with the family to ensure the child's needs are met either at SMS or through another provider.

**8. SMS may enroll students that require a setting that is not an inclusion setting.  
Describe how the school would provide services in B and C settings for students.**

**Response:** In order to meet the needs of all children who enroll at Sussex Montessori we will establish a staffing structure that will support the following mandate:

“Under the Individuals with Disabilities Act (IDEA) of 2004, districts and charters have an obligation to ensure that all students with disabilities have available to them a free and appropriate public education (FAPE) in the least restrictive environment (LRE) that emphasizes special education and related services designed to meet their unique needs, and prepares them for further education, employment, and independent living. Districts and charters must ensure that the rights of children with disabilities and their families are protected.” <https://www.doe.k12.de.us/Page/2383>

We recognize that some students, upon initial enrollment, may be identified as having complex or intensive needs. It is our understanding that students with complex needs identified on their IEP will require a 1:1 or 1:2 more than half the day and that SMS can utilize general education faculty, teacher assistants and other staff to ensure this ratio is maintained and the child is receiving the accommodations and modifications necessary. Students with intensive needs require small group or flexible group beyond grouping typical in the core instruction. This grouping is also required for children who are receiving tiered instruction through RTI for 90-150 minutes per week.

The initial staffing plan submitted by Sussex Montessori was insufficient to manage this possibility however it is our expectation that the revised staffing plan will meet the needs of any child(ren) identified with these needs. The new staffing plan is consistent with other schools with similar size populations. If Sussex Montessori enrolled an atypical percentage of students with complex or intensive needs it is our expectation that the needs based funding differential would allow for additional staffing as needed.

Sussex Montessori also recognizes that specialized transportation may be required per the IEP for some students. We intend to work with our connections in Sussex County to ensure any transportation needs not met by our regular bussing provider would be provided through a separate contractor.

Sussex Montessori intends to work collaboratively with the DOE Special Education Exceptional Children Workgroup so they may assist us in assessing the effects of efforts to educate the

SMS students as well as ensure compliance.

### Student Recruitment and Enrollment

#### 9. Describe the rationale for SMS marketing to students in Western Sussex when the prospective sites are approximately 15 miles away.

**Response:** Since the beginning, the Board of Sussex Montessori School has focused on a diverse school community that would be accessible to children across the county. We are aware that there is a larger concentration of children in poverty and a diverse community living in Central and Western Sussex County as illustrated by this data from the U.S. Census Bureau, Small Area Income and Poverty Program and the Delaware Department of Education.

District	Percentage of Children 5 to 17 in poverty	Percentage of African American Students	Percentage of Hispanic Students	Percentage of White Students	Other
Cape Henlopen School District	16.1%	12.4%	15.9%	65.9%	5.3%
Delmar School District	14.5%	14.2%	6.8%	69.7%	9.2%
Indian River School District	21.8%	12.5%	32.6%	49.3%	4.7%
Laurel School District	19.1%	28%	14.6%	49.7%	1.7%
Milford School District	19.4%	24.7%	19.7%	50.2%	5.3%
Seaford School District	30.2%	37.2%	20.4%	35.5%	6.9
Woodbridge School District	21.4%	25.2%	22.3%	48.6%	3.9%

We seek to place the school in an area of the county that will allow us to recruit and enable these children to have an alternative educational opportunity in a diverse (economically and racially) school community. We understand the challenges of serving these children both in providing transportation and in being sure that the families in the community have access to the lottery process.

Sussex County, by definition, provides logistical challenges given its width and breadth. The nature of the area is such that most residents will need to travel distances for many of the services they need for day to day living. No doubt this is a challenge for any school system that services the county, ie: Sussex Tech, Sussex Academy and Delaware Tech.

However, travel time in Sussex County tends towards fewer minutes on the road, as the reduced congestion translates into quicker commute times. For example, Seaford/Laurel to Georgetown, while approximately 12-15 miles apart, typically takes 20-25 minutes to drive. By

the same token, Greenwood/Bridgeville to Milford, averages 20-25 minutes to drive.

The Seaford school district uses as its guide that bus travel be under one hour. Using that as a guide we are comfortable that we will be able to match that guide with our charter school population. Later in our responses to the transportation questions, we address the information provided by Dutton Bus Company which further supports that done well a combination of door to door and hubs will allow SMS to transport children from various areas of the county to the proposed sites. We also provide a detailed estimate of the maximum bus travel times.

**10. Describe student retention in grade 6 since the proposed K-6 grade configuration does not align with other schools in the target areas (Note: consult Academy of Dover).**

**Response:** The academic, social, and behavioral benefits of attending SMS in sixth grade deeply outweigh logistical problems a transition to middle school in seventh grade may bring. Teachers who have the same students over a three-year cycle, allows them to guide their sixth graders through a sensitive transition in their lives. Sixth grade, in a Montessori school, is an opportunity for students to take on more challenging work (e.g., capstone “senior-like” projects) in a safe environment. The student who completes this full cycle is more fully prepared for the challenges that await them in the middle and high school years. Please see earlier response in section 0.2 for more complete explanation of why 6<sup>th</sup> grade is included in the school.

The challenge for Montessori Schools is to help parents understand that the benefits of staying in the school outweigh their intuitive logic that starting middle school in 6<sup>th</sup> grade is important for their child. There are several strategies that SMS will use to work with parents:

1. SMS will gradually add grade levels over time. It is expected that most of the students entering the first 6<sup>th</sup> grade group will have been in the school since the school opened. Based on the success of First State Montessori Academy, it is expected that once established, the school will enroll most new children in kindergarten and first grade. The premise of a Montessori School is to support not only the child, but the family that surrounds the child as well. The strong relationship that is built between the school and the family builds a foundation for communication about why a child should stay through 6<sup>th</sup> grade. This conversation will begin from the time a child first enters the school.
2. Parents are involved in many aspects of a Montessori School. They are respected and valued as a partner in their child’s education. They are often in classrooms sharing their own life experiences and cultural backgrounds. The relationship built with parents in a Montessori School extends beyond the typical involvement of parents in traditional school settings. Because of this, parents have a deep relationship with the teachers and school community. They see the benefits of the sixth-grade year first hand as they participate in the school community.

3. First State Montessori Academy applied and was approved for a major modification to add a middle school program to increase the retention of students in the sixth grade and beyond. This occurred prior to their first renewal. This has been a successful way for them to address retention into sixth grade. Once the first year is completed, SMS will have the opportunity to survey parents and to hold town meetings to determine their satisfaction with the school and any concerns of families regarding staying through sixth grade. The SMS Board will use this as an opportunity to evaluate the options they have for retaining families.
4. It is the responsibility of the Head of School, teachers, and guidance counselor to assist students to transfer to 7<sup>th</sup> grade. Because we will be serving approximately 65 6<sup>th</sup> graders, there is an opportunity to personalize this transition planning. The counselor and teachers will become familiar with the various Middle schools and work with children and parents to prepare them for the differences between the middle school and their Montessori experience.
5. Unlike other parts of the state, there is currently only one other charter school in Sussex County that serves middle school. This school begins with 6<sup>th</sup> grade and if one is not in the lottery for 6<sup>th</sup> grade one will most likely not be able to enter the school at a later date. While it is anticipated that this school will be a popular choice for SMS families, we cannot assume that all of the 6<sup>th</sup> graders from SMS would receive a spot in the school. In this current academic year there were over 100 students on the waiting.
6. The national networks of Montessori Schools address the issues of retention routinely. The SMS board, school leader, and teachers will find support for many creative ways to approach this issue. Coe and Breiman suggest the following strategies: 1) Make the sixth grade year a “not to be missed” experience. Schools do various curriculum related experiences as a part of the capstone 6<sup>th</sup> grade year such as participating in the Mock United Nations program and sixth grade expeditions. Once established the SMS Head of School and teachers will develop their own 6<sup>th</sup> grade traditions based on those of other Montessori Schools.

#### References

Breiman, R. & Coe, B. (2016). Why sixth-graders should be in a Montessori upper elementary program. *Montessori Life*, p. 47-48.

**11. The start date for open enrollment should be the first Monday in November, not November 1<sup>st</sup>. Provide a corrected policy.**

**Response:** Please see the revised Enrollment Policy Attached.

**12. Schools cannot require birth certificates. See the fact sheet at <https://www.justice.gov/sites/default/files/crt/legacy/2014/05/08/plylerfact.pdf>. Correct and provide the updated policy.**

**Under the “Re-Enrollment” section, the application states that if a parent does not submit a re-enrollment commitment form by the deadline established by the school, the student’s name will be withdrawn from the rolls of the school. A re-**

**enrollment form may be requested, but it is not permissible to withdraw a student because the parent did not provide one. Correct and provide the updated policy. The application requires student records in four weeks. A student's cumulative record must be processed promptly once a records request is received from a receiving school (see 14 DE Admin Code 252.3.0). Correct and provide the updated policy.**

**Attachment 8-A-5 – Certification of Intent to Enroll – conditions of “good cause” are not current. This should be updated based on 14 Del. Code, Chapter 5. Correct and provide the updated policy.**

**Response:** Please see the revised Enrollment Policy Attached.

### **1.4 Performance Management**

**13. There are currently only academic performance goals and climate goals. How will the school evaluate its organizational and financial performance?**

**Response:** In the submitted section **1.4 Performance management '18**, in response to question #5, we provide a table showing Organizational Framework Area, Accountable Staff/ Board Committee, and a schedule of Reports to the Board. We have added specific metrics that will be evaluated according to this table for organizational and financial performance, adapted from DE Organizational Performance Framework (<https://www.doe.k12.de.us/cms/lib/DE01922744/Centricity/Domain/368/Delaware%20Organizational%20Performance%20Framework%202016jlr.pdf>) and DE Financial Performance Framework (<https://www.doe.k12.de.us/cms/lib/DE01922744/Centricity/Domain/368/Delaware%20Financial%20Performance%20Framework%202016jlr.pdf>), in the attached **1.4 Performance management '18 (Revised)**.

### **1.5 Staffing**

**14. What financial support will teachers receive towards Montessori certification?**

**Response:** Typically, both public and independent school Montessori Teachers pay for at least a portion of their own training. There are formats where schools provide for part or all of the training with a commitment from the teacher to stay in the school for two to three years. If they leave prior to this, they would pay back a percentage of the funds. There are also loan models where the school requires that a percentage of the funds be paid back over the first three years of employment. This allows for a recyclable fund to support new teachers as needed.

It is the intent of Sussex Montessori School to submit a request for funding to the Welfare Foundation in the fall of 2018 (letter from Welfare Foundation in original application). One purpose of this request will be for \$100,000 to develop a fund that can be used to support the

SMS teachers for their Montessori training. Initially, this fund will be used to provide loans to teachers to cover their training. This will allow the school to continue to support new teachers with their training.

We will continue to strategically grow this fund with the goal that we can support at least part of the Montessori teacher preparation with a grant that requires the teacher to teach in the school for a set number of years in return. This model is currently used selectively at FSMA for teaching assistants who are interested in Montessori Teacher Preparation. The Board will use models from around the country to fully develop the framework during the planning year.

**15. Describe the school's contingency plan if the expected certified teachers are not available.**

**Response:** Those of us on the Board who are experienced school leaders understand the challenges involved with the addition of Montessori teacher preparation. However, we have always had the opportunity to hire exceptional teachers who are seeking a teaching environment that fits their vision for teaching. Teachers are attracted to the Montessori teacher preparation and teaching in a Montessori school because it matches their values. These teachers had to travel several hours daily in the summer months to complete their Montessori training. Most were not paid the teaching salary that they would have gotten in a public setting. However, in the many years as school leaders, our schools were not without highly qualified teachers in each classroom.

SMS will be actively recruiting teachers in Sussex County to teach at the school. Currently, SMS has 24 teachers who have completed an interest form that they would like to teach at SMS. Following the example of First State Montessori Academy, we will provide information sessions through out the fall and winter of the planning year so that teachers in Sussex County can learn about Montessori education and the Montessori teacher preparation program. We will also market the school across the country to attract already certified highly qualified Montessori teachers to the school. Members of the SMS Board are connected to national Montessori organizations, and would recruit informally as well as formally through Teach Montessori (<http://www.teach-montessori.org/>), the National Center for Montessori in the Public Sector (<https://www.public-montessori.org/>), the Montessori Accreditation Council for Teacher Education ([www.macte.org](http://www.macte.org)), and the American Montessori Society (<https://amshq.org/>). SMS expects that the launch of a local Montessori training program attracting both experienced and new teachers to the Montessori teaching will enhance the pool of teachers.

**16. The budget includes a special education teacher at .8 FTE, dual certification for all teachers and Montessori certification for all teachers. Based on the projected 20%**

**special education population, a .8 FTE special education teacher will not be sufficient to serve 52 students with IEPs. Describe how this staffing issue would be addressed.**

**Response:** Subsequent to the feedback from CSAC, Sussex Montessori has done additional research on the projection regarding the percentage of students with special needs anticipated in the early years of SMS. We have determined that 20% was an overestimate and have adjusted our expectation and related budgetary considerations to reflect a special needs population of 15%. Having made that shift however did not fully address the understaffing that was identified in our initial application. Sussex Montessori has made adjustments to the staffing plan to include 2 full time special educators. This staffing ratio 1:~20 is consistent with other charter schools with similar size populations and under the supervision of the Education Director it is our expectation that these two teachers will be able to meet the needs of the students' IEPs. Our plan still includes a teacher assistant in every classroom and it is expected that these staff members, in collaboration with the special education teachers, will provide a high quality learning environment for all students including those who will need modifications and accommodations per their IEP. A hiring preference for teachers dually certified in Special Education and training teachers in Montessori will only enhance the environment. We do recognize that we may not have all of our teachers certified in Special Education but we maintain that it should be considered a preference in the hiring process.

Sussex Montessori will also contract with providers such as an Educational Diagnostician, School Psychologist and Related Services (Speech, OT, etc.).

### **Professional Development**

**17. Describe the partnership between the University of Delaware's College of Education and Human Development and the National Center for Montessori in the Public Sector. How does this benefit teachers in Sussex County?**

**Response:** The UD Montessori Teacher Residency (UDMTR) is modeled on the NCMPS model for preparing teachers for public schools. The program offers an integrated teacher development that is school-wide, practice-based and focused on preparing Montessori teachers to work in the public sector. It offers high-quality Montessori training and wrap-around support for trainees and novices using a set of tools and structures designed to drive continuous improvement that is fueled by talent development.

This model has been used in Memphis, TN and Washington, DC. This program includes 5 weeks of summer courses (2 – 3 summers depending on the training level) which would be offered at the University of Delaware, a weekly coaching support for teachers, 4 weekend seminars during the academic year, and support for weekly lesson and child study meetings.

NCMPS will provide the curriculum, train local instructors and coaches, and support the Montessori Accreditation Council for Teacher Education (MACTE) accreditation process for the

program. MACTE is recognized by the National Department of Education as an accreditor for Montessori Teacher Education Programs. The goal is to have a Montessori teacher preparation program to support public Montessori programs in the region. Currently, it is anticipated that the program will begin in the summer of 2018. This will be dependent on enrollment demand for the summer of 2018.

Local teachers in Delaware currently travel to sites such as Princeton, NJ for their Montessori training. This will be prohibitive for teachers from Sussex County. These programs also do not provide the level of coaching and support that the NCMPS model brings to a school. The UDMTR model will support Sussex Montessori School to build a culture of a professional learning community around the Montessori approach and the needs of children in the school strengthening the school culture and learning for children.

**18. Will teachers be paid for their training time in the summer?**

**Response:** No Montessori Teachers are not typically paid for training time in the summer. First State Montessori does not pay teachers for their training time.

**1.6 Governance and Management –Legal Status and Governing Documents By Laws**

**Response:** The Sussex Montessori School Board respects the need for bylaws that support the governance structure of the school. We worked closely with legal counsel to develop bylaws which allowed for flexibility for the board to act under reasonable circumstances that may occur. With this in mind, we reviewed the bylaw recommendations from CSAC with our legal counsel and voted to approve the changes as outlined below.

**19. The minimum number of directors (3) specified in section 5.03 seems sparse given that two members of the board of directors are required to be a parent and a teacher by statute; it does not seem to allow for depth and breadth of experience that the charter school law contemplates will be included on a school’s board; given that quorum is defined in by laws as majority of directors, it could have far-reaching decisions being determined by only two people.**

**Response:** In consultation with our legal counsel, we have made the following change to Section 5.03, indicated in red below, and reflected in our revised Bylaws adopted on February 18, 2018:

**Section 5.03.**

Number. The number of directors constituting the whole Board of Directors shall be at least ~~three (3)~~ **five (5)** but no more than ten (10). Subject to the foregoing limitation, the directors may fix, from time to time, the number of directors which shall constitute the whole Board of Directors by adopting a resolution to such effect.

**20. Section 5.08, terms of office of directors – it is not clear how “two consecutive terms (i.e. 6 years)” will be applied given the described initial terms of each class of**

**directors. For example, a class A director’s initial term expires in 2020; if chosen for another term, that is three years and expires in 2023 for a total service of 4 years over two consecutive terms. Is that person not eligible to serve another term? Or, is the term limit two consecutive “full” 3-year terms?**

**Response:** In consultation with our legal counsel, we have made the following change to Section 5.08, indicated in red below, and reflected in our revised Bylaws adopted on February 18, 2018:

**Section 5.08.**

Term of Office of Directors. The initial term of each founding member of the Board of Directors shall be for one year. Thereafter, beginning with the first Board election in 2019, the Corporation shall have three (3) categories of directors: (i) Parent Directors, (ii) Teacher Directors and (iii) At-Large Directors. Among those three categories, the directors of the Corporation shall be divided into three classes (designated as Class A, Class B and Class C), with each Class to hold office for a term of three (3) years. The directors shall be allocated by the Board among the Classes so that each Class contains as close to one-third of the total number of directors as is mathematically possible, and any directors who are Parent Directors, Teacher Directors or At-Large Directors shall, taken as a group, be allocated among the three classes of directors so that each Class will, to the extent mathematically possible, have an equal number of Parent Directors, Teacher Directors or At-Large Directors. Upon the above, the term of office of the Class A directors shall expire at the 2020 annual meeting; the term of office of the Class B directors shall expire at the 2021 annual meeting; and, the term of office of the Class C directors shall expire at the 2022 annual meeting. At each annual election held after the 2019 annual meeting, directors shall be chosen for a full three (3) year term to succeed those whose terms expire. ~~No~~ **After the initial term of the Founding Directors, no** director may serve more than two consecutive terms ~~(i.e. 6 years)~~.

**21. Section 5.10 – as a public body, a charter school board of directors cannot act without a quorum.**

**Response:** In consultation with our legal counsel, we have made the following change to Section 5.10, indicated in red below, and reflected in our revised Bylaws adopted on February 18, 2018:

**Section 5.10.**

Vacancies; Newly-Created Directorships. Vacancies and newly created directorships resulting from any increase in the authorized number of directors may be filled by an affirmative vote of 3/4 of the directors then in office, **though less than a quorum, or by a sole remaining director**, and the directors so chosen shall hold office until the next annual election and until their successors are duly elected and shall qualify, unless sooner displaced; provided, however that any vacancy with respect to a Parent Director position on the Board must be filled by a parent or legal guardian of a student enrolled in the School and any Teacher Director position on the Board must be filled by a teacher at the School. If

there are no directors in office, then an election of directors may be held in the manner provided by statute.

**22. Section 6.01 – “public body” is defined in 29 Del. C. § 10002(h), not 29 Del. C. § 10002(a)**

**Response:** In consultation with our legal counsel, we have made the following change to Section 6.01, indicated in red below, and reflected in our revised Bylaws adopted on February 18, 2018:

**Section 6.01.**

Compliance with the provisions of the Freedom of Information Act. The Board shall conduct its meetings as a “public body” as defined in 29 Del. C. § ~~10002(a)~~10002(h) and according to the requirements of Chapter 100 of said Title 29 (the “Delaware Freedom of Information Act”).

**23. Section 7.03 – Committees of public bodies are also public bodies and are subject to the open meeting provisions of Delaware’s Freedom of Information Act.**

**Response:** In consultation with our legal counsel, we have deleted Section 7.03 and have renumbered subsequent sections as appropriate, which is reflected in our revised Bylaws, adopted on February 18, 2018.

**24. Section 7.06 – Under the charter school law, the only entity empowered to control a charter school is the board of directors.**

**Response:** In consultation with our legal counsel, we have deleted Section 7.06, which is reflected in our revised Bylaws, adopted on February 18, 2018.

**25. Section 9.03 – allowing only one officer to execute instruments, particularly without any parameters to that authority (e.g., amount, type, etc.) seems risky and could easily lead to problems with finances, fiscal responsibilities, oversight, etc.**

**Response:** In consultation with our legal counsel, we have made the following change to Section 9.03, indicated in red below, and reflected in our revised Bylaws adopted on February 18, 2018:

**Section 9.03.**

Execution of Instruments. All checks, drafts and orders for payment of money shall be signed in the name of the Corporation and shall be signed by ~~any one of the following officers: the Chair, the Vice Chair, the Treasurer, the Secretary or such individuals as designated by the Board~~ an officer authorized by the Board to do so. All contracts, conveyances or other instruments which have been authorized by the Board shall be executed in the name and on behalf of the Corporation, and have affixed thereto the corporate seal, by the Secretary of the Corporation or his or her delegate.

**26. Article XI – Charter school board members are public officers under 29 Del. C., Chapter**

**58 and subject to those laws. The by-law provisions and the conflict of interest policy need to comply with those laws. In addition, it might be prudent to note, where applicable, that the provisions of this section will comply with 29 Del. C., Chapter 58 (for example in Section 11.03, regarding payments or benefits.)**

**Response:** In consultation with our legal counsel, we have made the following change to Section 11.01, indicated in red below, and reflected in our revised Bylaws adopted on February 18, 2018:

**Section 11.01.**

Purpose. The purpose of the conflicts of interest policy is to protect the Corporation's interest when it is contemplating entering into a transaction or arrangement that might benefit the private interest of an officer or Director of the Corporation. This policy is intended to supplement but not replace any applicable state laws governing conflicts of interest applicable to nonprofit and charitable corporations or a charter school, **including 29 Del. C., Chapter 58 (the "State Code of Conduct"). In the event of any conflict between the State Code of Conduct and any provision herein, the State Code of Conduct shall govern.**

**27. Section 12.05 – Under Delaware law, anything purchased in whole or in part with State funds is considered an asset of the State; 29 Del. C., Chapter 70 applies to the disposal of state owned assets.**

**Response:** In consultation with our legal counsel, we have made the following change to Section 12.05, indicated in red below, and reflected in our revised Bylaws adopted on February 18, 2018, noting that our legal counsel was careful that revisions to this section were compliant with 501(c)(3) laws:

**Section 12.05.**

Dissolution. Should the Corporation cease to act and be dissolved, its property and assets then remaining shall **first be distributed as required by applicable law, if any, and any remaining** property shall then be paid over to and become the property of a charitable organization designated by the Board, provided, however, that payment shall be made hereunder only to such corporations, trusts, foundations, or other organizations as are organized and operated exclusively for religious and/or charitable educational or scientific purposes and are exempt from federal income tax under Section 501(a) of the Code as organizations described in Section 501(c)(3) of the Code. In the event that the above organizations shall not qualify hereunder, the amount that it would have received upon dissolution shall be paid over to one or more other qualifying organizations.

**28. Conflict of interest policy – should be in compliance with 29 Del. C., Chapter 58; might be prudent to reference the applicable provisions of that law.**

**Response:** In consultation with our legal counsel, as noted above, we have made the following change to Section 11.01, indicated in red below, and reflected in our revised Bylaws adopted on February 18, 2018:

**Section 11.01.**

Purpose. The purpose of the conflicts of interest policy is to protect the Corporation's interest when it is contemplating entering into a transaction or arrangement that might benefit the private interest of an officer or Director of the Corporation. This policy is intended to supplement but not replace any applicable state laws governing conflicts of interest applicable to nonprofit and charitable corporations or a charter school, including 29 Del. C., Chapter 58 (the "State Code of Conduct"). In the event of any conflict between the State Code of Conduct and any provision herein, the State Code of Conduct shall govern.

**1.7 Parent and Community Involvement****Community Involvement****29. Provide evidence of how the Board will continue to cultivate grassroots Sussex County support for a Montessori education.**

**Response:** We have identified specific individuals and organizations that are committed to engaging the community in support of the school. Listed below are the specifics engagement tactics in place along with some defined strategies to further enhance these efforts as we move forward:

1. We have a database of approximately 300 supporters with whom we regularly communicate using email technology.
2. We anticipate the addition of at least two more Sussex County residents to the Sussex Montessori School Board within the next month. We will continue to search for local residents to assume leadership roles for the School.
3. Leadership Group-Sussex County-a focused group of residents from various backgrounds that can work with the board to energize the efforts through their connections and experience.
4. Specific Community Organizations we have communicated with that can help us today:
  - a. Sussex Health Coalition
  - b. L'Esperanza
  - c. Boys and Girls Club
  - d. Rotary
  - e. First State Community Action
  - f. Sussex County Leadership Delaware Fellows
5. Parent support-we are currently creating a network of parent volunteers organized by geographic region to provide leadership, communicating our mission and increasing parental interest in their own" backyard". This will facilitate communication and participation.
6. Church connections-we have identified that our underserved population may be more readily accessed through their church connections and have identified key leaders who can assist us in engaging these residents to communicate the mission of our Charter school.

7. We have created Spanish translations of our case statement and will also be translating this statement into Haitian Creole for use in reaching all segments of the community in Sussex.
8. We will use these networks to organize public meetings, organized by geographic location, and led by the parents and volunteers in the core groups.

## **1.8 Start-up and Operations**

### **Transportation**

**Overall Response:** The size and rural nature of Sussex County makes transportation a challenge for districts and charter schools alike. Sussex Montessori School understands that once the final site is identified we will need to work closely with our community partners, transportation companies (both school bus and smaller vehicle transportation companies), and with any other schools in proximity to our site to develop routes that minimize the amount of time that students are on a school bus, support the families of children who are underserved and wish to attend SMS, and yet allow for efficient use of the transportation funds allocated to the school.

**30. The transportation plan does not appear to be sufficient to serve the needs of underserved families which SMS projects to be at 50% of the school population. Provide a transportation analysis that addresses:**

**a. How underserved families would be able to access the school;**

**Response:** In consultation with Dutton Transportation and review of the transportation routes for Sussex Tech and Sussex Academy, SMS expects that transportation will be provided on a hub basis at locations strategically placed throughout the County with limited door-to-door accessibility when parents can justify the need. In addition, we are considering options for providing assistance to children who do not have transportation to reach the hubs. One such option is limited door-to-door transportation either via a school bus route or to provide for access through smaller van services in the county such as Delmarva Transportation.

**b. The varying transportation costs of the different proposed school building locations (e.g. Georgetown versus Milford). Potential bus route models or simple model routes to project cost and timing would be helpful.**

**Response:** Current transportation plans are provided for a Georgetown location. We continue to evaluate site options. We will provide the CSAC route designations if a Milford location is decided on during the planning year. Please see the transportation attachment for sample hubs and routes. In conversation with Mr. Dutton of Dutton Transportation, SMS learned that currently public-school bus rides providing door to door transportation in Sussex County can be as much as 1 hour and 15 minutes. With the hub approach, the bus runs tend to be 30-45 minutes. Without knowing the exact location of the school or the location of the children, Mr. Dutton estimates 5 busses for a combined door to door and hub approach @ \$44,000 per bus.

**31. How will SMS ensure parents with transportation barriers are able to engage with the school and IEP meetings? Provide public transportation routes in Sussex County. The application shows a lack of understanding about Sussex County.**

**Response:** Funding has been allocated to assist economically disadvantaged students and parent’s transportation to and from IEPs assessments, meetings and special events, etc. While limited, public transportation may provide a way for some families to reach a local “hub” from which SMS could provide van service to the school through such providers as Delmarva Transportation. Please see attached public transportation routes. SMS will continue to work with partners such as LaEsperanza to determine the best ways to support families who need transportation to school meetings and events. We anticipate conducting a fund-raising campaign to enhance the funds allocated in the budget. Such funds could support the purchase of school owned vans after the school is established.

**32. Provide a list of providers that the school has contacted to demonstrate that the cost estimates are realistic and show transportation contracts are realistic.**

**Response:** Attached is a letter from Dutton Transportation (who services Sussex Academy and is the largest bus contractor in the county) indicating ability and cost for the transportation of students. SMS has acquired a list of bus contactors in the county (attached) and will continue to acquire other estimates for services.

**Lunch/Breakfast**

**33. The application states that the school nurse will work with the foodservice vendor. This is not typically the role of a school nurse. There needs to be a designated person for school nutrition (does not need to be full time) that will be responsible for the administration of the program and also the operations. Reporting, training, monthly claims for reimbursement are all requirements. Also, point of service meals counts at each meal are required.**

**Response:** Upon inquiry with other charter schools, SMS learned that the school nurse in sometimes responsible for the distribution of and point of service counts for meals. However, in view of CSAC’s advice, funding from the program will cover additional part-time staff (assistant teachers, part-time temporary workers) to assist with the responsibilities. We also intend on using a point of service system in the lunch program to identify meals served, providing data to the state.

**Student Health Services**

**Response:** The SMS Board understands the serious responsibility of the school in relation to the health and safety of all children and staff. It was our understanding that the questions below were to be addressed in the development of the Health and Safety Manual during the planning year. As a general practice, this manual will be modeled after the School Nurse Manual provided by the Delaware Department of Education and found here:

<https://www.doe.k12.de.us/Page/2866>. We have provided details from this manual in response to the questions asked.

**34. What medication policies will be in place for administration in school and provisions for field trips? Will this be included in the Health and Safety Manual?**

**Response:** The school will follow the recommended guidelines contained in the School Nurse Manual. Specifically:

Students may need to take medications during school hours. These may be: periodic, e.g., short term antibiotic for an infection; routine, e.g., insulin for diabetes; or periodic, e.g., analgesic for occasional headaches. As per Delaware Code all prescribed medications and treatments administered by the nurse at SMS will be: 1) prescribed currently (within a year and preferable within the current school year) by a licensed healthcare provider, 2) provided, in the original labeled container, to the school by the parent/guardian or responsible adult, 3) not expired or outdated, 4) accompanied with current written permission for administration from the parent/guardian, 5) counted by the parent/guardian and school nurse when received or returned by the school nurse, and 6) administered by the school nurse. Over-the-counter medications require only parent/guardian permission for administration by the school nurse. All administration will be preceded by the nurse's assessment and documented in the student's school health record.

It will also be our expectation that our school nurse completes the following course found in PDMS: **#26279 Assistance with Medication for School Nurses**

**35. What is the plan for the Epinephrine for Anaphylaxis in Schools (EAS) for the Trained Person program?**

**Response:** SMS will follow the recommended guidelines contained in the School Nurse Manual. Specifically:

The School Nurse will annually review the Delaware Division of Public Health annual medical emergency Standing Orders for allergic reactions in previously undiagnosed individuals for use by public/charter school registered nurses (16 DelCode §3003E). The school will maintain the required equipment and supplies as recommended each year. The school will identify specific staff including the nurse for training to become Trained Persons (who can administer epinephrine to diagnosed and undiagnosed individuals showing symptoms of anaphylaxis) and Trained Assistants (who can administer lifesaving medication such as epinephrine to students with individual prescribed medication at an approved school activity). As per the Division of Public Health Annual Standing Order for the treatment of allergic and anaphylactic reactions (16 DelCode §3003E) the school will maintain stock epinephrine, diphenhydramine (Benadryl), and oxygen. As required by Delaware law, (16 Del.C. Ch. 30E) SMS will have a sufficient number of Trained Persons in the school to administer epinephrine to diagnosed and undiagnosed individuals showing symptoms of anaphylaxis.

It will also be our expectation that our school nurse completes the following course found in PDMS:

**#24743 Epinephrine for Anaphylaxis in Schools (EAS) for the School Nurse Instructor**

Additionally, other staff who were identified as a Trained Responder would complete the following:

**#24744 Epinephrine for Anaphylaxis in Schools (EAS) for the Trained Person****36. What is the plan for Naloxone availability in the school?**

**Response:** The Delaware Division of Public Health provides a Standing Order for school nurses, working in a public school serving high school age students, to administer naloxone for symptoms of opioid overdose. As our school would not be serving students of high school age we would not require Naloxone availability.

**37. While the narrative provides specific actions for certain medical events, it is not comprehensive regarding injuries, when 911 is to be called for further evaluation for referrals. Is this expected to be included in the Health Manual?****38. Describe how health emergencies be handled. Please note that the school nurse can coordinate and supervise Emergency Healthcare Plans, but they must be written by the primary healthcare provider and submitted by the parent.****Response for 37 and 38:**

SMS will include in the Health Manual specific guidelines for when 911 is to be called. At all times, the first consideration is the welfare of the student. Specifics regarding emergency health care plans for individual students will also be addressed in the Health Manual. It is understood that any Emergency Health plans for individual student or staff members would need to be written by the primary health care provider and submitted by the parent or guardian. SMS will follow the guidance from the state Nursing Manual as follows:

In the event of any serious accident, illness, or necessary exclusion, the student's primary caregiver will be notified as promptly as possible. To facilitate prompt communication, information will be secured early in the school year from the family and kept current on the Emergency/Nursing Treatment Card, which will be maintained in the health room for easy accessibility, and in an electronic health record. The school nurse or school administrator will contact the parent/guardian/relative caregiver or emergency contact (provided by the parent) to coordinate who will pick up the child and assume responsibility for his/her care. If the student's symptoms are related to a current diagnosis or prescription, or if the situation is an emergency, EMS may be activated and the student's healthcare provider may be contacted. At the beginning of each school year, the school nurse and administration should agree on communication and protocols related to routine and emergency responses. The first consideration must always be the welfare of the student.

**Insurance Coverage****39. Provide a description of the coverage of the Directors and Liability Policy; will it cover, e.g., claims that the school failed to provide a free appropriate public education to a student with a disability?**

Please see the attached sample insurance policy provided by New Castle Insurance.

This policy is the standard policy that they use for Delaware Charter Schools and is the one that the quote provided in the original application is based on.

**40. Will the policy be a claims made or claims occurred one?**

This is a claims made policy.

**1.10 Budget and Finance**

**41. The budget narrative specifies that the mortgage will be paid for by State and local funds but the spreadsheet shows other funds in Year 1 and 2. Please clarify.**

**Response:** Originally, funds from the Longwood Foundation were allocated to cover Debt Service in year 1 and 2. We have reconsidered this approach and debt service for the school facility has been programmed in State/Local Funds for Year 1 to Year 4.

**42. The budget for related services appears to be too low based on the projected special education population. Describe the number of students and costs for services.**

**Response:** Additional funds have been budgeted for special education teachers through IDEA funds. The revenue from Consolidated Grant funding is included in the revised Budget and Finance attachments. Please see question 16 for an explanation of how SMS has used CSAC feedback to readdress the estimate of the number of special education students and staffing needed.

**43. Line 19 – Cafeteria - Budget Narrative (State & Local) states that cafeteria expenses are budgeted at \$625/student/year. However, no amount is listed on line 19 of the State & Local budget sheet in any year. There are expenses listed on the Federal budget for cafeteria. Was the inclusion of cafeteria expenses in the narrative for State & Local a mistake?**

**Response:** It was a mistake. Free and reduced lunch funds were included in the Federal Funds budget worksheet up to 90 % of the students being eligible. The remaining students who will pay out of pocket have been included in the other budget worksheet.

**44. Line 27 – Therapists (Occupational/Speech) -Budget Narrative (State & Local) shows budget of \$1,000 per student per 10% SPED/ELL Contracted Services. Is \$1,000/student realistic for speech/OT/PT/etc.? These services can be expensive. Also, 10% special education population may be low (if it ends up being higher, then they would earn additional funds to support the additional students; however, \$1,000/student still seems low).**

**Response:** With the addition of IDEA funds to the budget, FSMA was able to do a thorough review of contracted services related to special needs. The budget has been adjusted to include Therapists and Educational Diagnosticians in State and Local funds at a rate of 20 hours a week at a cost of \$70 per hour to be distributed as required to meet the needs of the children served.

**45. Line 28 – Classroom Technology - Budget Narrative (State & Local) indicates “Systems for Teacher Classrooms.” There is \$0 budgeted for year 1, then \$5,000/year thereafter. Provide additional information on this line and why there is nothing budgeted for year 1. \*\*budget for Year 1 appears to be under “Other funds”**

**Response:** Classroom technology has been programmed under Other Funds for the Planning Year and Year 1 with subsequent years programmed through State and Local funds. Funders are more likely to support technology vs. other operational costs; therefore, we will work to address technology needs through a robust fund-raising campaign to be launched in the fall of the planning year.

**46. Line 29 – School Climate - Budget Narrative (State & Local) indicates “Responsive Classroom materials.” There is \$0 budgeted in years 1 and 4 and \$1,000 budgeted in years 2 & 3. Provide additional information on this line and why there is nothing budgeted in years 1 and 4. \*\*budget for Year 1 appears to be under “Other funds”**

**Response:** Responsive Classroom Materials are being provided as part of the planning year funds through Welfare Foundation. In subsequent years, we plan to use Title IV funding to provide for school climate training costs. These are included under the Federal Funds budget.

**47. Line 30 – Computers - Budget Narrative (State & Local) notes budgeted items “Tech for Administrative/Clerical staff”; however, there are no amounts listed on line 30 of the State & Local budget sheet in any year.**

**Response:** Additional funds have been allocated for technology for administrative staff.

**48. Line 31 – Contracted Services - Budget Narrative (State & Local) indicates the amounts budgeted are for substitutes. In year 1, \$5,640 is budgeted, which would cover approximately 55 staff absences (about 5 days per FT teacher). Is this a realistic projection?**

**Response:** The budget has been adjusted to cover 10 days for each full-time teacher per year.

**49. Line 33 – Insurance** –Quote provided is based on enrollment of 280 students and teaching staff of 15. Total insurance quoted (for all policies listed) is \$28,950. Budget for all 4 years is \$15,000. If workers compensation policy is excluded, annual cost is \$15,350. Provide clarification of which policies will be purchased. Also, the general liability policy will likely increase as enrollment increases; however, the budget does not reflect this.

**Response:** The budget has been adjusted to accommodate the insurance rate as noted.

**50. Line 36 – Utilities - Budget Narrative (State & Local) states “Payment for 4 facilities.” The budgeted amounts are \$10,000 in year 1 and \$15,000 in years 2-4. This seems extremely low. What is this based on?**

**Response:** As an estimate, according to Excel Energy, the national average for electricity costs are \$.67 / Sq ft. and for natural gas \$.19 / sq ft for elementary schools annually. At 30,000 square feet, the annual total is estimated at \$25,000 per year. We expect to open only 22,500 square feet in the first year and increasing the size in Years 2, 3, and 4. The budget has been adjusted accordingly. For 80% enrollment we will need approximately 15,000 square feet in year 1. The budget has been adjusted accordingly.

**51. Line 38 – Telephone/Communications - Budget Narrative (State & Local) states “contracts for telephone, computer bandwidth.” The budgeted amounts are \$3,000 per year, which equates to \$250/month. This seems extremely low. What is this based on?**

**Response:** We have included additional funding in the technology plan for the school. We anticipate the use of new technology such as Voice Over Internet Protocol (VIOP) to assist with reducing the costs of telecommunications.

**52. Line 44 – Supplies & Materials - Budget Narrative (State & Local) states, “Supplies for Administrative Staff is being allocated under Other funds for the planning year.” Nothing is budgeted in years 1-4 for supplies and materials. This seems unrealistic. \$15,000 worth of supplies purchased in the planning year is not going to last for five years.**

**53. Line 46 – Postage & Shipping – nothing is budgeted in Years 1-4.**

**54. Line 47 – Enrollment and Recruiting – nothing is budgeted after year 2.**

**Response to Question 52, 53, 54** - Additional funds have been allocated to address these concerns.

**55. Line 50 – Other - Budget Narrative (State & Local) states this is to cover “Costs for audit, legal, and financial services (back office) – All contractual.” The amount**

**budgeted is \$50,000 per year. However, a different section of the application states that back office will cost \$35,000 per year, which leaves \$15,000 to cover audit and legal costs. The audit alone will cost nearly \$15,000, so where is the remainder to cover legal?**

**Response:** We have added \$20,000 for legal fees.

**56. Federal funds budget only covers free/reduced lunch funding. There does not appear to be any other entitlement funding (Title I, II, IV, IDEA, etc.) budgeted. Was this an oversight?**

**Response:** The addition of federal funding allows SMS to address many of the issues raised by CSAC. We have added Title I, Title II, Title IV, and IDEA funding to the Federal Funds budget. We have applied Special Education Teacher costs to the IDEA funding and Assistant Teachers to the Title I funding. In addition, we are using Title IV funding for school climate and Title II funding for professional development, in particular responsive classroom training. The estimates for this funding was determined through an extensive review of 14 elementary charter schools in the across the state. Please see chart in attachment 1.10 budget and financials.

**57. Other Funds budget – line 6 – Miscellaneous Revenue – indicates that teachers will be required to reimburse the school for professional development training in Year 1 (paid over 3 years at \$10,000 per teacher).**

a. **Is this a standard practice?**

**Response:** This is one way that Montessori Schools support teachers to pay for the Montessori teacher preparation. This is the plan reflected in the budget at this time.

b. **Do teachers have to pay for their own professional development?**

**Response:** Yes, with a loan system the teachers would pay for Montessori Training much as they would pay for an advanced degree. However, SMS plans to work towards the development of a scholarship fund to support teachers with grants for a portion of the Montessori Teacher preparation. SMS plans to support teachers with other professional development opportunities as well. Grants and other opportunities will be sought to support this effort.

**58. Equipment for the Health Office: Does the budget support equipment costs such as reference materials, cots, refrigerator, locked cabinets, oxygen, epinephrine, naloxone, first aid and injury supplies?**

**Response:** An additional \$5,000 per year has been added to the budget for these costs.