

PROSPECTUS – NEW YORK CITY MONTESSORI CHARTER SCHOOL

EXECUTIVE SUMMARY

The New York City Montessori Charter School will be located in District 7 in the South Bronx, in which students' academic results have led it to be designated as "In Need of Intervention" for two years in a row, and will provide parents and students with a different option for their education. The school's curriculum is based on an alignment of the Montessori approach with the National and New York State Core Curricula. Its educational program is based on the belief that children learn best within an environment that supports and respects each individual's unique development.

Mission Statement

The New York City Montessori Charter School will empower children to be critical thinkers and creative problem solvers with strong social skills so that they can succeed in their world and continue to learn in their pursuit of higher education as they prepare for careers needed in the 21st Century.

Key design elements of the NYCMCS

Differentiated instruction. - In a Montessori classroom, instruction is tailored to the individual needs of students. Having two adults in the classroom allows the teachers to work with small groups or individual children to provide lessons at different skill levels while the other children complete assignments or practice skills. Assignments vary in complexity and are geared to different ability levels and/or learning styles. Independent work also allows students to devote different amounts of time, according to their needs, in order to achieve mastery of tasks.

Assessment. Continuous ongoing assessment is vital for effective differentiated instruction. Teachers will use a comprehensive battery of assessment tools for diagnostic, formative and summative assessments. Using multiple assessments, the teacher can obtain a comprehensive picture of student achievement and use the data to inform ongoing instructional decisions such as adjusting activities to particular learning styles or providing additional support and/or intervention. Such data can also be used to gauge the effectiveness of the instructional program, and inform professional development and school progress towards accountability.

Specially designed materials that provide concrete representation of the abstract. An important Montessori tenet is: "*The way to the brain is through the hands.*" This is borne out by the research of Piaget, which indicates that a child must interact with real objects, have time to investigate and test his ideas, and discuss his ideas with others in order to build satisfactory mental constructs. The Montessori approach uses a wide range of specially designed concrete materials that represent abstract concepts, particularly in math and language arts. This physical modeling fosters the internalization of accurate mental representations of these operations.

Mixed age groups. Students will remain with the same teacher for two or three years in the Elementary Levels: (only Kindergarten will be a single-age group). This continuity maximizes teaching and learning time, as students do not spend time every year getting to know new teachers, classrooms, and entire new peer groups. Multiage grouping avoids the identification of slow students and improves peer culture, resulting in peer tutoring, peer modeling, and peer reinforcing. Since all students are not expected to have identical skills or perform equally, there is less competition, more respect for each person's individuality, and the recognition that everyone has unique strengths and contributions to offer the group, which promotes cooperation, empathy, and a sense of community. It also encourages self-respect and keeps students involved and motivated, which is particularly useful for at-risk and special needs students. Students whose primary language is other than English typically receive special support and assistance from their multi-age classmates.

Unique Design Characteristics

Development of independence and the freedom and ability to make choices. In a Montessori classroom, the teacher provides freedom within limits. Children become independent learners and make choices,

which permits them to become responsible for their own learning, and contribute to the formation of lifelong learners. The children work on Individual Work Plans and work journals which serve as records of their work for the week, and can be used by the teacher to collect data on the individual children, and plan instruction for the following week.

Time and practice to achieve mastery. In order for successful learning to occur and for students to meet achievement goals, the amount of repetition and the time needed for processing information and skills vary according to the child, the skill, and the topic. Allowing students the time they need for mastery also helps children learn how to concentrate and develop patience and perseverance. The long blocks of time included in the schedule for students to work independently on their Work Plans and the classroom materials provides increased efficiency, leading to increased time-on-task and enhanced skills in application of knowledge.

Motivation. According to Montessori, the function of the school is “*not only to make the child understand, and still less force him to memorize, but to so touch his imagination as to enthuse him to his innermost core.*”¹ This reflects a basic tenet of the Montessori method: that children are naturally motivated to learn and that school must nurture and exploit their motivation in order to maximize academic achievement. The NYCMCS will harness students’ intrinsic motivation by giving them opportunities to interact and share with their peers as they work on projects to acquire knowledge and skills that take into account their interests and experiences.

The Founding group of the NYCMCS

The capacity of the founding group to effectively launch, oversee, and govern the school derives from the experience, knowledge, expertise, and resources of its members. At present, the group includes the lead applicant, the proposed instructional coordinator, and an extensive network of educators and experts who have generously contributed to the application process. It also includes the founding Board of Trustees which currently consists of six members (eventually seven or nine members) with a range of skills and areas of expertise including: Montessori, traditional and special education; community outreach; legal; finance; Spanish language; and real estate. Both the school leader and the instructional coordinator have had previous experience in establishing successful schools. The school leader can count on the support of the Montessori community (CMTE, AMI, the Montessori foundation) to provide access to the collective experience of Montessori school leaders throughout the country for advice and consultations. The founding board of trustees includes two employees of SoBRO, the institutional partner, who can facilitate work with the community. The Board will incorporate three more members: a business professional, a member of the South Bronx Community, and a parent (selected by the Family Association once the school opens). The Board members have participated intensely and assisted during the application process, and are committed to upholding and supporting the school’s mission and charter.

Partnership with SoBRO

The school will form an Institutional Partnership with the South Bronx Overall Economic Development Corporation (SoBRO), a non-profit community based organization with a long history of success in serving the South Bronx Community. The services it offers range from the development of affordable housing, to training for setting up small businesses and tutoring, college application assistance, theme based arts programs, GED preparation courses, counseling, community service projects, job placement for youth and young adults, career counseling, and vocational training for adults. To extend the reach of SoBRO’s programs, the NYCMCS intends to reach out to the community with forums, parent workshops, student internships, family support, and after school programming for the students. It is anticipated that SoBRO will offer the school the following services (as detailed in the Institutional Partnership Agreement): fund raising and community outreach activities, support in Human Resources management and finance activities, and facilities identification and development support.

¹ Montessori, M. *The absorbent mind*. New York, Holt, Rinehart and Winston, 1967.

II. STUDENT POPULATION

A. Student Enrollment (taking into account attrition)

GRADE	Students	Students	Students	Students	Students
KINDERGARTEN	52	52	52	52	52
GRADE 1	52	52	52	52	52
GRADE 2		52	52	52	52
GRADE 3			48	48	48
GRADE 4				46	46
GRADE 5					44
Total # of Students	104	156	204	250	294

B. Target Population – General statistics and description

NYCMCS intends to open a school in Congressional District 16, in School District 7. Our Institutional Partner, the South Bronx Overall Economic Development Corporation (SoBRO) is located near an area called “the Hub,” which is in Community District, in which school district 7 is located. For this reason, we have contacted this Community Board who have promised us a letter of support as soon as we find a location (this is in accordance with their established procedures). Our aim is to find a location close to SoBRO so that we can take full advantage of the programs they offer.

The student population of Congressional District 16 comes from families with the highest poverty rate in the U.S.; 41.6%² of the population in this area lives below the poverty line.³ The median income is \$19,018, the lowest in the country, and one-third of households earn less than \$10,000 annually.⁴ In the schools, 89% of students in School District 7 were eligible for free and reduced price lunch. School performance is affected by factors associated with poverty such as stress, health issues and lack of academic support. In his recently published book, *Teaching with Poverty in Mind*, Eric Jensen describes the emotional and social challenges and the cognitive lags that impinge negatively on children living in poverty and their academic achievement.⁵ These effects are evident in the academic performance of students in the Bronx. In the 19 high schools in the Bronx, less than 50% of students graduated in the 2002-2003 school year; by 2007, this rate had only risen to 60%.⁶ In the latest test results for District 7 (2009-10), only 36% of third grade children scored 3 or above in ELA, and 33% in Math (4th grade ELA 36%, Math 32%; 5th grade ELA 40%, Math 34%).⁷ This seems to indicate that schools in the Bronx have a high proportion of students with special needs. A school-by-school analysis of the percentage of children with special needs for 2008-09 gives a range of between 12% and 51% in the elementary schools in Bronx School District 7.⁸

The last census reports state that 70.8% of the total population is Community Board 1 is of Hispanic origin, and 25.9% is African American; two-thirds of the population speaks a language other than English at home, and of those, 96.9% speak Spanish/Spanish Creole. Of the population that speaks a language other than English at home, 52.3% report that they “do not speak English very well.”⁹ A high proportion of adults have low educational levels; close to half of residents in Congressional District 16 lack high-

² U.S. Census Bureau, 2005 American Community

³ KIDS COUNT Census Data Online, 2000 U.S. Census

⁴ Lehman College, Bronx Data Center, available online: <http://www.lehman.edu/deannss/bronxdatactr/discover/bxtext.htm>

⁵ Jensen, E. (2009). *Teaching with poverty in mind*. Alexandria, VA: Association for Supervision and Curriculum Development.

⁶ Reynolds, A.S. (2009, May 9). The Bronx beat, *City's education achievements debated*. Retrieved from <http://128.59.96.140/bronxbeat09/www/story.asp?id=498>

⁷ ns, T. . (2010, July 28). New york school test scores. *New York Times*, Retrieved from <http://projects.nytimes.com/new-york-schools-test-scores/counties/bronx/districts/new-york-city-district-7>

⁸ *New york testing and accountability reporting tool*. (2009). Retrieved from <https://www.nystart.gov/publicweb/District.do?year=2009&county=BRONX&district=320700010000>

⁹ KIDS COUNT Census Data Online, 2000 U.S. Census

school degrees. Of the adult population, 20% has less than a 9th grade education, compared to 6% nationally.¹⁰ Finally, The overall percentage of English Language Learners identified in elementary schools in District 7 for 2009-10 is 17.39%.¹¹

These statistics make it highly probable that a high proportion of children the school will serve will be living in poverty, will have special needs, and will not be proficient in the English language.

Student Recruitment

The board and staff of the NYCMCS are committed to attracting, serving, and retaining a comparable or greater percentage of students with disabilities when compared to the average for Community School District 7 in the Bronx, using a broad range of strategies. They will contact the local CSE, parent advocacy groups, and early intervention providers. In addition, through SoBRO's programs, the team will send out information for families with young children. They will contact CBOs serving Special Education and ELL students and Day Care and Head Start Program directors to inform them of the support the school will provide for students with special needs and English Language Learners and also make presentations at these institutions. All these presentations and written materials, such as pamphlets, brochures and posters, will be in English and Spanish (both the proposed school leader and Instructional Coordinator are fluent in Spanish) and will state specifically that the school will provide services and accommodations for students with disabilities and ELL. The team will also seek interviews with local newspapers and radio stations in English and Spanish, and set up a website and a Facebook page.

The founding team has been attending CEC meetings, and has discussed plans with the Superintendent of CEC 7 for jointly creating workshops for parents on topics that will help them support their children's education at home. The NYCMCS has agreed to present workshops for parents in both English and Spanish, including topics such as reading to their children, storytelling, topics of conversation, family meals, and more. Similar workshops and outreach meetings could be offered at nearby daycare centers, libraries, churches, and at SoBRO. The school leader has initiated contact with various daycare centers by donating materials, asking the Directors to speak to their families about the school, and leaving brochures for them to distribute.

With the support of SoBRO, the founding team will make efforts to reach families that are traditionally less informed about educational choice options, which include new immigrants, non-English speakers, parents of children who do not attend daycare centers, and people with limited education. The team will present workshops and distribute brochures at institutions offering services to new immigrants, child health care centers, English language schools, arrange interviews on Spanish language radio stations, and set up information booths at community events.

How the NYCMCS serve these students

All students benefit from an inclusive education where students of varying abilities learn together. The unique characteristics of the educational program of the NYCMCS lend themselves to providing this inclusive environment. All students will be included in all day-to-day functions of the school as well as extra-curricular activities.

The instructional methods inherent in the Montessori approach at NYCMCS are particularly appropriate for student populations with a wide range of learning styles and needs. Students who are at risk for academic failure are a diverse group of individuals with a diverse set of needs, and so there is probably no single strategy that can keep all of them in school until graduation. However, a combination of strategies

¹⁰ U.S. Census Bureau, 2005 American Community Survey

¹¹ *New York testing and accountability reporting tool*. (2009). Retrieved from <https://www.nystart.gov/publicweb/District.do?year=2009&county=BRONX&district=320700010000>

can help many at risk students succeed and stay in school. (Ormrod, 2006)¹². To attend to ELLs, at-risk students, and students with special needs, Ormrod recommends many strategies: differentiated instruction, individualized attention to each child, one-on-one and small group instruction, mixed-age groups, peer tutoring, extra time on-task, repetition and re-teaching, using multiple modalities and multi-sensory lessons, and special concrete materials.

The NYCMCS program will employ all of these strategies routinely with all students, not only with ELLs and students with special needs. Differentiated instruction and individualized attention have the advantage of being able to identify the particular strengths of children with special needs and ELLs and in the NYCMCS these strengths are incorporated into the students' Individual Work Plans in order to support development in other areas. One-on-one and small group instruction are basic strategies for differentiation in the Montessori approach. Multiage grouping is also an integral part of the Montessori approach. It provides an inclusive environment where individual differences are accepted, peers give each other recognition and assistance, and peer tutoring and collaboration are encouraged. These classrooms preclude comparisons, accommodate uneven development, and easily accommodate support and interventions for children who need them. They encourage students to feel successful in school and therefore attain concepts of themselves as competent persons.¹³ The Individual Work Plans will permit children to proceed at their own rate for mastery and accommodate as much repetition as the child requires, the specially designed Montessori manipulative materials assist in the conceptualization of abstractions and in automating math operations, and the routine multi-sensory approach ensures all channels of information are employed to maximize learning in all areas.

The NYCMCS will routinely employ with all students other Montessori specific strategies that were originally designed to help children with disabilities. It will teach specific procedures/techniques for training attention, which help children focus on completing tasks and to learn perseverance and patience; a set procedure for selecting and performing all tasks, which aids in the development of executive function; and specific techniques for increasing gross-motor skill development, eye-hand coordination, and fine-motor skill facility. In general, all the aspects of the Montessori approach described here enhance the development of attention, order and organization, visual and auditory perception, oral language development, academic skills and the development of social skills.

Finally, the ongoing professional development program will give teachers support in dealing with the broad range of students in their classrooms, including students with disabilities and English Language learners. The school also intends to hire an Instructional Coordinator, who will work with the Principal to develop action plans based upon student achievement data reviews, and will coordinate Special Education and ELL services, including attending CSE meetings and arranging for teachers to attend meetings as well. She will also work with the Principal to do informal and formal observations and lesson plan reviews, and attend grade level and staff meetings on a regular basis. The school will hire a full time Special Education teacher and a part-time social worker who will provide the services to children with special needs enrolled in the school and coordinate with teachers to ensure the children are receiving the accommodations and attention they need. In addition, the school will contact the local CSE for related services for students with identified needs that the school is unable to provide with its own staff. The Principal and the Instructional Coordinator will implement a professional development program that assists the staff in adapting the school's curriculum to meet students' individual needs, and create a school environment where students thrive academically and socially while allowing for specific learning differences. NYCMCS will educate students with disabilities in the least restrictive environment, with their non-disabled peers to the extent appropriate and as forth by each student's individualized education

¹² Ormrod, Jeanne. (2006). *Educational Psychology Developing Learners*. New Jersey: Pearson Education, Inc.

¹³ Pickering, J.S. (2004). The at Risk student: how the Montessori classroom enhances learning. *Montessori Life*, Retrieved from http://findarticles.com/p/articles/mi_qa4097/is_200404/ai_n9399221/?tag=content;col1

plan (IEP) prepared by the Committee on Special Education (CSE) of the students' school region of residence.

Methods and strategies for serving students who are ELLs

In accordance with its inclusive education policy, the NYCMCS will ensure that students who are ELLs will not be excluded from curricular and extra curricular activities based on an inability to speak and understand the language of instruction, nor will they be assigned to special education because of their lack of English proficiency. The NYCMCS will use English Immersion and the Sheltered Instruction Observation Protocol (SIOP) model¹⁴ (described below) to promote these students' English language development and make grade-level academic content more accessible to them.

Identification. The NYCMCS will use the State Education Department's process for identifying students whose first language is not English and those who are English Language Learners as follows:

1. **Screening:** Upon enrollment, the school will administer the Home Language Questionnaire. If the initial screening indicates that the student speaks little or no English, he/she will be referred for initial assessment.
2. **Initial Assessment:** For this, the school will administer the Language Assessment Battery-Revised (LAB-R). A score below the designated cutoff score will determine eligibility for inclusion in the SIOP program and/or support services for ELLs.
3. **Inclusion in the school's ELL program** for eligible students and referral to special services where necessary.
4. **Annually**, the school will administer the NYSESLAT to determine a student's English performance level and determine continuation of services.

Language instruction program. The principal strategies that the NYCMCS will use for language instruction for ELLs are those suggested in the Sheltered Instruction Observation Protocol (SIOP) model. The goal of this model is to develop English language skills together with academic skills. Content instruction will be provided in English, and ELL students will be taught the same academic content as those who are native English speakers. The model stipulates a specific method of lesson planning and delivery for these children. This includes multiple strategies for each of the elements of the model, such as:

Preparation: identify the language demands of the content course; define language objectives for all lessons and make them explicit to students; pre-reading and pre-writing activities.

Building Background: activate and strengthen background knowledge through activities with concrete objects, films, visits etc.

Comprehensible Input: emphasize academic vocabulary development

Strategies: use varied vocabulary techniques, e.g., in art projects, etc., repeat vocabulary in different contexts

Interaction: promote oral interaction and extended academic talk; use vocabulary lists; give structures for discussions; encourage pair work

Practice/Application: give multiple opportunities to practice using vocabulary orally and in print

Lesson Delivery: present new lessons with links to prior knowledge; use physical activities, visual aids, word walls, and semantic webs

Review/Assessment: review vocabulary and content concepts at the end of each lesson; give students feedback on language use in class.

However, in recognition of the need to give ELL students extra support in content acquisition, the NYCMCS will make all possible efforts to hire some bilingual teachers, in order to be able to check that

¹⁴ *Helping educators work effectively with English language learners.* (2010). Retrieved from <http://www.cal.org/siop/>

content is being understood. The school may need to modify its staffing based on the percentage of students who are ELLs.

The Individual Work Plans and differentiated instruction complement this model since they allow students to spend the amount of time needed on each stage of learning before moving on to the next. Multi-age groups provide children with the opportunity to interact with children whose English is more advanced. Pair work, buddies, and lessons in small groups give students opportunities to communicate in English with their peers. Finally, the school's extended day program will allow more time to be used for additional intensive English language instruction.

When needed, the school will make referrals to appropriate support services in order to ensure that particular ELLs achieve and maintain a satisfactory level of academic performance. Such services may include individual counseling, group counseling, home visits, and parental counseling.

Evaluation. The *No Child Left Behind Act* (NCLB) requires that the language arts proficiency of all students who are ELL be measured annually as part of school and district accountability. NCLB also requires that the English proficiency of all ELL students be assessed annually. The school will administer the New York State English as a Second Language Achievement Test (NYSESLAT) to ELL students on an annual basis to evaluate their English proficiency. The scores on the NYSESLAT indicate the proficiency level the student has achieved each year, and whether the student's level of English proficiency is high enough to exit the ELL program or support services. The school will also evaluate each student's performance in academic content areas to measure their progress in core subjects. If a student who is an ELL fails to show sufficient progress in academic areas, his/her Individual Academic Program will be modified.

Methods and strategies for serving students with disabilities

Identification. Children entering the school in Kindergarten may not have been identified as requiring special services by the time they begin school. Upon admission to the school, before school opens, all Kindergarten children will be assessed, and on the basis of the results, recommendations will be made for further educational evaluations as needed. For those children who already have IEPs, the Principal and/or the Instructional Coordinator will meet with their families and arrange to accompany them to a meeting with the CSE to review the student's IEP and ensure the school is able to comply with it as written. In cases where there are requirements that the school is unable to meet, the school will work with the CSE to introduce modifications that will permit the school to meet the requirements to the extent possible. In accordance with §2853 (4)(a) of the Education Law, the school will provide special education services to students with disabilities according to their IEPs as developed by the Committee on Special Education (CSE) of the student's school district of their residence.

Curriculum and approach to instruction designed/adapted to students with disabilities. Our implementation of the inclusion model will allow us to serve the needs of all students, including those students classified as students with disabilities, in the least restrictive environment. At the NYCMCS, full inclusion of special education students means the delivery of services inside the regular classroom. Thus, children who qualify for related services (as dictated by their IEPs) will, to the extent possible, receive their adapted curriculum work, and other therapies such as speech-language, physical, and/or occupational therapy, within their regular education classroom. Teachers will receive copies of their students' IEPs, and will be knowledgeable about the needs of students with disabilities, informed of their responsibilities for particular students, receive support to implement a student's program, and implement any modifications or accommodations in their classes in accordance with the students' IEPs.

When appropriate and in accordance with students' IEPs, special educators and therapists will come to the regular education classroom, to provide services to small groups of regular and special education students

in ratios dictated by the IEPs. A special education teacher, instructional specialist, or associate teacher may sit with students to help implement the goals of an IEP. In the school's first year, NYCMCS will hire a full-time, certified special education teacher who will deliver instruction, provide special services and assist the Instructional Coordinator in coordinating services. In later years, the number of special education teachers will depend on the number of students with disabilities enrolled in the school.

Full inclusion will ensure that social and academic interactions with general education students are valued and leveraged to support all student needs. For special education students, full inclusion provides the opportunity to observe appropriate behaviors and actions modeled by others. For general education students, full inclusion and work on joint projects with special education students fosters an appreciation and respect for the fact that everyone has unique characteristics and abilities. For special education students this setting fosters the development of feelings of empowerment and self-control. Teachers will be knowledgeable about the needs of students with disabilities, informed of their responsibilities for particular students, receive the support they require to implement a student's program, and implement any modifications or accommodations in their classes in accordance with the students' IEPs.

Should the IEP of a student entering the school require services that are beyond the skills and expertise of the school's personnel, the school will work with the families and the CSE to find the specialized providers, and if it is necessary to allocate a more restrictive environment than provided by the school's inclusion model, the NYCMCS will work with the student's family in asking the CSE to hold an IEP re-evaluation to determine if the existing recommendation is appropriate or can be modified to reflect the support provided by the school.

The Principal and the Instructional Coordinator will assist in the long- and short-term planning to address individual needs of students, the evaluation of students' progress, ensuring reports are written accurately and in a timely manner and effectively communicating with teachers and families to facilitate the IEP processes. They will represent the NYCMCS at CSE meetings and provide coverage as needed for teachers so they can attend CSE meetings.

Monitoring of progress. The NYCMCS will carefully monitor the progress of all students with special needs using formative assessments, teacher observations, and other school-designed assessments to ensure that the goals in the IEP are met. The school will also inform parents of how their children are progressing on annual IEP goals and in the general curriculum, and the extent to which that progress is sufficient to enable the student to achieve the goals by then end of the school year. These progress reports for parents of children with special needs will be as frequent or more frequent than reports for parents of regular education children.

Professional development for teaching ELLs and students with disabilities. All teachers will receive professional development related to working with ELLs and students with disabilities. In this respect, they will receive training on how to apply the Sheltered Instruction Observation Protocol (SIOP) model to meet the needs of English language learners. This training will also cover instructional planning and delivery methods for teaching ELLs, assessment of progress using instruments such as school created checklists and quizzes, different cultural heritages and their implications for the teacher, support services appropriate for ELLs, and ways to communicate with their parents/guardians.

Teachers will also receive on-going training regarding the education of students with disabilities. Montessori training includes knowledge a full range of skills for a range of ages, which allows teachers to differentiate instruction and include children who may be above or below grade level in particular areas. The provision for regular teachers meetings to evaluate programs, discuss children, and plan strategies will ensure that instruction is targeted to children's individual needs, and that teachers are informed of

special provisions delineated in students' IEPs. They will work closely with the Instructional Coordinator and Special Education teacher to plan instruction and accommodations as needed for these students.

Continued program assessment. Using data obtained from academic assessments and ELL assessments, the Principal will evaluate the ELL program annually to ensure that it is achieving the desired results (that students are making progress in the acquisition of the English language and making progress academically). Similarly, the Principal will use assessment data to evaluate the school's performance with students with disabilities and the fulfillment of their IEPs. As mentioned elsewhere, these data will inform decisions on program modification and on the planning of professional development in response to them.

The NYCMCS uses the Montessori approach, which is based on four basic premises. Researchers have validated these premises, demonstrating their impact student results:

1. *All children pass through the same stages of intellectual development, each one of which requires a particular type of learning experience.* This premise receives support from the work of later researchers such as Piaget¹⁵, Vigotsky¹⁶ and Bruner.¹⁷
2. *Every child is unique, with individual strengths and weaknesses, learning style, rate of learning and needs.* This is borne out by the theories and research of Howard Gardner (Multiple Intelligences)¹⁸ and Mel Levine (All Kinds of Minds).¹⁹
3. *Freedom within limits harnesses the child's innate motivation to learn.* Self-determination theory (Deci and Ryan²⁰) and self-worth theory (Covington²¹) support this assumption.
4. *Young children learn best through experience and the use of concrete learning materials.* Support for this premise comes from the work of Piaget, Bruner, and mental models theory. (Johnson Laird, Gentner and Stevens²²)

On the basis of these premises, teaching in a Montessori classroom is differentiated and individualized and makes use of a vast array of specially designed developmentally appropriate concrete learning materials and lessons that are sequenced progressively. Instruction is tailored to the individual needs of students. Students are grouped according to skill level and receive small group instruction at their level. They receive assignments that vary in complexity according to their ability levels and/or learning styles. They are allowed to devote different amounts of time to achieve mastery of tasks. Such differentiation increases the effectiveness of instruction for individual children and promotes achievement dramatically. The most important aspect of the teacher's work becomes that of gathering data and continuously assessing students' performance in order to make appropriate and timely instructional interventions that ensure that every child achieves academic success. Students are given freedom to choose within limits and to work independently at their own pace following an individual work plan. Daniel Pink supports the value of these practices in his latest book, *Drive*, where he states that: "*Many of the key tenets of a Montessori education resonate with the principles [derived from research on motivation] ... that children naturally engage in self-directed learning and independent study; that teachers should act as observers and facilitators of that learning, and not as lecturers or commanders; and that children are naturally inclined to experience periods of intense focus, concentration, and flow that adults should do their best not to interrupt.*"²³

¹⁵ Piaget, J. (1972). *The psychology of the child*. New York: Basic Books.

¹⁶ Verillon, P. Revisiting Piaget and Vigotsky: In Search of a Learning Model for Technology Education. <http://scholar.lib.vt.edu/ejournals/JOTS/Winter-Spring-2000/pdf/verillon.pdf>

¹⁷ Bruner, J. *The process of education*. Cambridge, MA: Harvard University, 1960.

¹⁸ Gardner, H. *Frames of mind: the theory of multiple intelligences*. New York, Harper and Row, 1980.

¹⁹ Levine, M. . (2003). *A mind at a time*. New York, NY: Simon & Schuster.

²⁰ Deci, E.L., & Ryan, R. M. (1985). *Intrinsic motivation and self-determination in human behavior*. New York: Plenum.

²¹ Covington, M.V. (2000). Goal theory, motivation, and school achievement: an integrative review. *Annual Review of Psychology*, 51(171-200).

²² Gentner, D. (2002). Psychology of mental models, In N. J. Smelser & P. B. Bates (Eds.), *International Encyclopedia of the Social and Behavioral Sciences* (pp. 9683-9687). Amsterdam: Elsevier Science.

²³ Pink, D. (2009). *Drive: the surprising truth about what motivates us*. USA: Riverhead Hardcover.

Multiage grouping complements these practices; it provides an inclusive environment where individual differences are expected and accepted, slow students are not openly identified, and peer tutoring, peer modeling, and peer reinforcing²⁴ can take place. It also encourages self-respect and keeps students involved and motivated, which is particularly useful for at-risk and special needs students who in this environment typically receive special support and assistance from their multiage classmates.²⁵ Additional support and interventions are easily accommodated in these classrooms. Thus multiage grouping is particularly suited to increasing the achievement of the student population the NYCMCS will attend, which is expected to have a high proportion of students with special educational needs and English Language learners.

The benefits of the Montessori approach are clearly stated by a nine-year-old child who switched from a public school to a Montessori school two years ago. In a letter he wrote to us explaining what he considered to be the differences between the two approaches, he says:

- “ *Using materials helps me get a better understanding of what I do, and helps me as I go into more and more complicated akidemicks [sic].*
- *The teachers push us to do great work, so that I can find a better understanding of how great the work is that I can do.*
- *In public school, I was (unfortunately) not a great student because the teachers never pushed us, but, ever since I joined the Montessorie [sic], I have been a much better student.”*

Research studies indicate that children educated in Montessori schools are well prepared academically, socially, and emotionally. In addition to scoring well on standardized tests of reading, language arts and mathematics, children in Montessori schools are ranked above average on such criteria as following directions, turning in work on time, listening attentively, using basic skills, showing responsibility, asking provocative questions, showing enthusiasm for learning, and adapting to new situations.²⁶ Furthermore, the Montessori approach has shown significant success rates in improving the academic achievement of urban students, developmentally delayed students, and students learning English as a second language.²⁷

There are many large urban public school systems around the country that employ the Montessori approach; out of approximately 4,000 Montessori schools in the United States, close to 10% of are in public schools. Most public Montessori programs are in magnet school programs and charter schools, in cities such as Washington, DC, Milwaukee, San Francisco, Hartford, Springfield, Cincinnati, Boston, Baltimore, and Denver, to name a few. A chart demonstrating the test scores for Montessori schools in the city of Milwaukee, compared to the scores for students at other public schools provides an interesting comparison. The demographics of that city are comparable to those of the Bronx, though the free/reduced lunch statistics are not as dire as those in the Bronx (72% compared to the 89% in Bronx School District 7). The second chart is a comparison of the scores for schools in District 7 compared to the scores for all public schools in New York City:

²⁴Brookover, W.B., L. Beammer, H. Elthin. *Creating Effective Schools: An In-Service Program for Enhancing School Learning Climate and Achievement*. Holmes Beach, FL: Learning Publications, Inc. 1982.

²⁵Grant, J. (1993). Questions and answers about multiage programs. In D. Sumner (Ed.), *Multiage classrooms: The ungrading of America's schools* (pp. 17-19). Peterborough, NH: Society for Developmental Education.

²⁶Duax, Tim. (1989). Preliminary report on the educational effectiveness of a Montessori school in the public sector. *The NAMTA Journal*, 14(2), 56-62.

²⁷Harris, E. M. (2004). Evaluation of the reorganization of Northboro Elementary School in Palm Beach County, Florida: a ten year perspective. Dissertation, Union Institute and University.

Comparison Chart – Percentage of students scoring 3-4 compared to whole school district

	Grade 3	Grade 4	Grade 5
Milwaukee – all schools			
ELA	48%	55%	52%
MATH	57%	58%	56%
Milwaukee – Montessori Public schools			
ELA	77%	71%	74%
MATH	71%	58%	56%

Comparison Chart – Percentage of CED 7 students scoring 3-4 compared to all NYC

	Grade 3	Grade 4	Grade 5
New York City – all schools			
ELA	47%	46%	46%
MATH	54%	58%	60%
Bronx CEC 7			
ELA	31%	27%	26%
MATH	36%	37%	41%

ELIGIBILITY CRITERIA

a. How the proposed school design will increase student achievement and decrease student achievement gaps in reading/language arts and mathematics:

The NYCMCS design model has many features that are particularly appropriate for increasing student achievement and closing achievement gaps in reading/language arts and mathematics.

All strands of English Language Arts – reading, writing, speaking, and listening - are integrated with all other academic areas. Reading and writing will occur across the curriculum and will be applied in all areas. The NYCMCS will provide a rich range of activities and experiences with language, with the aim of developing strong reading comprehension skills in all academic areas and a deep love of reading, as well as strong writing skills and a true love for writing in a language rich environment. Students will receive direct instruction in phonics, grammar, vocabulary, fluency, and comprehension skills as well as in expository and creative writing. Language arts learning will also occur through the use of hands-on materials that stimulate sensory input. For example, specific geometric shapes represent parts of speech and are used to explore grammar, and wooden manipulatives facilitate learning parts of a sentence, from subject and predicate all the way to adverbial phrases. Kindergarten will emphasize vocabulary enrichment through materials that stimulate the senses. Careful and continuous formative assessment will allow teachers to adjust instruction to maximize students’ progress in all strands of English language arts.

Guided Reading will complement direct individual and group reading instruction. This will vary according to the different instructional needs of all the students in the class, and help individual students learn how to process a variety of increasingly challenging texts with understanding and fluency. Guided Reading will take place in small-group settings, allowing for interactions among readers and direct instruction by the teacher. The teacher will select and introduce texts to the students, support them (as needed) as they are reading the text, engage them in discussion, and introduce a mini-lesson on specific skills after the reading. Comprehension strategies will receive reinforcement through discussion groups, book reports, art projects, and research.

NYCMCS will place great emphasis on written communication and writing will form an integral part of all school activities. Students will write throughout the day, both individually and collaboratively. They will write daily journals recording their work, respond to writing prompts, and write reports, expository

texts, fiction, and poetry. They will produce texts for thematic units, literature circles, research projects, bulletins, and newspapers. They will receive explicit instruction on writing strategies, text structure, and editing. They will learn and practice the writing process through frequent written assignments, and older students will use the NCTE Six Traits of Writing as guiding rubrics. Students will meet with teachers frequently to discuss their work, present it to their peers, and critique one another's productions and suggest improvements. These practices will stimulate the development of very advanced skills in writing. According to Lillard and Else Quest (2006) "Montessori students' essays were rated as significantly more creative and as using significantly more sophisticated sentence structures. At the end of elementary school, Montessori children wrote more creative essays with more complex sentence structures."²⁸

Students will develop their oral skills through conversations with their peers, small and large group discussions and presentations, and the many opportunities that they have to discuss and defend their ideas with their peers and their teachers. Students of all ages will make oral presentations, and presentations of research projects will form an important part of the summative assessment of 4th and 5th grade.

The approach to math is especially well suited to developing proficiency and maximizing student achievement. It will emphasize instruction in number sense and operations, algebra, geometry, problem solving, communication, measurement, statistics and probability. Teaching will progress in a logical way from one level of difficulty to the next, giving students time to achieve mastery of each level. This will ensure that students have all the previous knowledge necessary to progress successfully to the next topic. Students will work with special Montessori manipulative materials that are specifically designed to provide them with the conceptual understanding of math concepts, and give them practice with operations to develop procedural fluency. Teachers will follow a carefully planned sequence of lessons with their corresponding materials, ensuring that knowledge and skills acquisition is on target for each grade level. The sequence of math lessons and materials follows a logical conceptual flow with increasing levels of complexity each year. The sequencing integrates process (problem solving, reasoning and proof, communication, connections, and representation) and content (number sense and operations, algebra, geometry, measurement, and statistics and probability).

NYCMCS will improve students' learning by giving them many opportunities to apply their knowledge in problem solving and real-life situations and projects. Students apply new knowledge to the environment (e.g., in experiments to measure the loss of water from a dripping faucet over time, using right triangles to measure areas on maps) and in the creation of handwork, such as a decorated booklet of multiplication facts, or three-dimensional models of cubes, spheres, etc. Real-life experiences and projects will continually reinforce learned skills and serve as summative assessments for the units.

The ability of the founding group to increase achievement in ELA and math will depend first of all on its capacity to set up the NYCMCS as designed. In this regard, all members of the planning team have contributed their knowledge and expertise in both Montessori and general education to put together the educational program. Over the past 9 months, the planning team has visited numerous schools and engaged in conversations with many educators to inform the planning process.

A second aspect of the founding group's ability to increase achievement will be its capacity to effectively oversee the school's operations and adherence to the charter. To this end, it is presently developing an assessment system that encompasses student achievement, teacher effectiveness, the work of administrators, the school's financial integrity, the Institutional Partner, and the functioning of the board itself. This will provide essential data for making decisions that will ensure the effective functioning of the school and the improvement of achievement in all areas.

²⁸ Lillard, A., & Else-quest, N. (2006). Evaluating Montessori education. *Science*, Vol. 313.

The founding group has also made provisions in the proposed budget for financing SPED and ELL teachers who will give extra support to students who need it and ensure they meet the highest levels of achievement they are capable of in all areas.

b. Increase high school graduation rates and focus on serving at-risk high school student populations (including re-enrolled drop-outs and those below grade level); N/A

c. Focus on academic achievement of middle school student populations and preparation for transition to high school (if applicable). N/A.

d. Utilize a variety of high-quality assessments to measure understanding and critical application of concepts.

The founding team designed NYCMCS’s program on the premise that ongoing assessment data will drive instruction. For this reason, a wide variety of assessment tools and procedures will be employed to measure understanding and critical application of concepts and the data provided by these tools and procedures will be analyzed, compared, and integrated. The weekly schedule will include time for meetings with staff and administrators to analyze data and plan instruction.

During the planning period, educators in the planning team will embark on the construction of the curriculum by effectively aligning Montessori methods and materials with the NY State and National Core Curriculum Standards. They will also develop an initial set of school-designed assessment tools in the core academic areas. In order to ensure the alignment of these instruments with state standards, they will use the performance indicators of the NY State Core Curriculum and the National Core Curriculum Standards to establish benchmarks. They will prepare a series of NYCMCS Curriculum & Assessment Handbooks for the Kindergarten, Lower Elementary (grades 1, 2 and 3) and Upper Elementary (grades 4 and 5) students to provide a framework for teachers so they may approach their work with students and colleagues with consistency and shared language and expectations. These handbooks will describe the curriculum for each grade and the **student assessment system** for measuring understanding and critical application of concepts, indicate the assessment instruments and procedures for diagnostic, formative and summative assessment and include design guidelines for teacher-created assessments.

The following table indicates the elements of the student assessment system. The Toolkit refers to the instruments used for formative assessment.

	Kindergarten		Grades 1-2		Grades 3-4-5	
	Formative	Summative	Formative	Summative	Formative	Summative
SEPT	School designed assessments in all areas DRA		School designed assessments in all areas DRA		School designed assessments in all areas DRA	
OCT	Assessment Toolkit		Assessment Toolkit		Assessment Toolkit	Authentic end-of-unit product
NOV	Assessment Toolkit		Assessment Toolkit	Interim ELA/math assessment	Assessment Toolkit	Simulated STATE TESTS
DEC	Assessment Toolkit			Authentic product	Assessment Toolkit	Authentic product
JAN	Assessment Toolkit	DRA	Assessment Toolkit DRA		Assessment Toolkit DRA	
FEB	Assessment Toolkit	Interim ELA/math assessment	Assessment Toolkit	Interim ELA/math assessment	Assessment Toolkit	Interim ELA/math assessment
MAR	Assessment Toolkit		Assessment Toolkit	Authentic	Assessment Toolkit	SAT 10

				product		Authentic product
APR	Assessment Toolkit	SAT 10	Assessment Toolkit	SAT 10	Assessment Toolkit	STATE TESTS - ELA
MAY	Assessment Toolkit		Assessment Toolkit		Assessment Toolkit	STATE TESTS – Math Science – 4 th gr.
JUNE	Assessment Toolkit	DRA Interim ELA/math assessment	Assessment Toolkit	DRA Authentic product	Assessment Toolkit	DRA Authentic product

Diagnostic assessment at the beginning of each school year is essential for the individualization of instruction. In order to identify the specific needs of each child, teachers will apply the following assessment tools: the *DRA*, which detects individual reading levels; and *teacher-created assessments* which will identify ELA and Math levels, content knowledge and skills in other areas, as well as interests. The data obtained from these assessments, along with test results from the previous year, including state test results for those grades where this is applicable, and SAT 10 results, will give a baseline for each individual student and provide a diagnosis of the needs of the group as a whole. Over the first month of classes, the teachers at each level will meet as a team to compare the results of these assessments with the NY State Curriculum, and design common interim academic goals corresponding to standards aligned benchmarks for each grade. On this basis, each teacher will create a yearly and monthly teaching plan for his/her class. Each week, teachers will create a general plan for the students in their class, as well as an Individual Work Plan for each student, tailored to take into account his/her specific areas of strength and weakness.

The cornerstone of success in ensuring the students' achievement goals is continuous **ongoing formative assessment**. The Handbook will include a toolkit for formative assessment which will include: checklists of performance indicators in the core curriculum areas, teacher journals, students' Individual Work Plans, a school designed rubric for measuring understanding and critical application of concepts in end-of-unit authentic products and portfolios, the NCTE writing rubric, and teacher designed bi-weekly quizzes in ELA and math. While students work independently on their Individual Work Plans, teachers will observe each one and record his/her progress on the checklist of performance indicators. They will record informal observations on academic work and on student motivation, interests, critical thinking or interpersonal behavior in their teacher journals. In addition, the students' Individual Work Plans will serve as records of work each student has carried out independently and as further indicators of their progress towards interim academic goals. From grade 1 up, students will take bi-weekly quizzes created by the teacher in ELA and Math to gauge progress towards benchmarks. The DRA will be re-administered to any student who is observed to be struggling with reading. Periodically, students will edit their written work using the NCTE Six Traits Writing Rubric as a guide. The students will maintain a portfolio of their best work, with samples of written text, creative writing, representative math problems, research reports, etc., in order to illustrate his/her progress over time. Throughout the year, teachers will give the students practice tests that will be used to predict results on State tests.

Teachers will use various a variety of instruments **summative assessment**. At the ends of units, children will create *authentic products* that reflect their learning. These will be assessed using standards based benchmarks for content areas such as Math, ELA, Science, and Social Studies. The benchmarks will be discussed previously with the students, who will participate in the assessment process through self and peer evaluation. Teachers will apply a school-designed rubric for measuring understanding and critical application of concepts or the assessment of portfolios. Periodically, teachers in all grades will administer interim standards-based benchmark-tied assessments in ELA and mathematics, in order to gauge progress towards goals. End of year State mandated tests will measure achievement in ELA and math in third, fourth and fifth grade students, and in Science in fourth grade students. Similarly, the Stanford

Achievement Test in ELA and math (SAT 10) will be administered to all grades in order to provide alternative national norm referenced data on achievement, as will the DRA, which will provide national norm referenced performance data on reading.

e. Increase implementation of local instructional improvement systems to assess and inform instructional practice, decision-making and effectiveness:

The student assessment system described in III.d. will provide important data for instructional improvement. It will assess and inform instructional practice, decision-making and the effectiveness of the school in several ways.

In weekly meetings, the teachers and administrators will analyze the data gathered continuously from ongoing formative assessments to determine which students are ready for more advanced instruction and which need additional support, in order to prepare appropriate Individual Work Plans for each student. This analysis will also inform decisions such as the adjustment of class groupings (small groups, individual instruction) or changes in the sequence or content of lessons presented to the students. The data will also provide information on the progress of SWD and ELL students. Finally, students will use data from some of these forms of assessment for self-evaluation, thus developing their metacognitive skills.

The results on summative assessments will provide useful data. The results of interim standards-based benchmark-tied assessments in ELA and math will help decide if there is a need for remedial action, and if so, what type of action must be taken. The information obtained from end of year state and national norm referenced assessments will be used to measure absolute achievement, and to track individual and group growth from one year to the next. It will also help to identify the program's strengths and weaknesses and determine where improvements should be introduced. Finally, instructional effectiveness, teacher performance, the professional development plan, and progress towards the schools goals will be evaluated using the summative assessment data .

However, the improvement of instructional practice does not depend solely on the student assessment system. It also depends on an effective teacher assessment system. A recent article in *Educational Leadership* examining research on teacher evaluation systems concludes that "...a consensus is emerging that we need multiple measures that tap evidence of good teaching practices as well as a variety of student outcomes, including, but not limited to standardized test score gains"²⁹ for effective teacher evaluation. It also found Principal evaluations to be very effective. On this basis, the teacher assessment system in the NYCMCS will take into account not only student results on standardized tests and yearly test score gains, but also other measures of student outcomes, such as authentic product assessments, formative and summative assessments, portfolios and student presentations, as well as Principal evaluations of teaching practice.

Every day, the Principal and/or the Instructional Coordinator will visit each classroom to carry out informal observations of the teacher, and will make at least one formal observation visits annually. There will be six domains in the Rubrics for observation of teachers: planning and preparation for learning; classroom management; delivery of instruction; monitoring assessment and follow-up; family and community outreach; and professional responsibilities. The Principal will have a follow-up discussion with the teacher to analyze these observations and may propose collaborative ways of giving the teacher support or mentoring, or give other recommendations for improving instructional practice. Principal will so an annual analysis of student results on standardized tests, yearly standardized test score gains, student results on interim and final summative assessments, authentic product assessments, portfolios, and student presentations, as well as records of the Principal's and the Instructional Coordinator's observations and the results of their evaluations of each teacher's teaching practice. The

²⁹ David, J.L. (2010). Using Value added measures to evaluate teachers. *Educational Leadership*, 67(8), 81.

Principal will prepare a written report of findings which will be discussed with the teacher in a formal summative assessment conference at the end of spring to examine the teacher's results and determine renewal of contract.

Evaluation of the school Principal is another important aspect of the instructional improvement system in the NYCMCS. The Board will carry out a yearly evaluation of the school Principal, using key operations benchmarks: staff and student satisfaction, progress towards goals in the charter, academic progress, and overall status of the school. At each meeting, the Board will review a report of performance indicators that integrates specific data elements and goals. Yearly updates will ensure that this report reflects the most valid and reliable indicators of school success within key academic, financial, and operational areas.

Finally, instructional improvement will depend on the effectiveness of certain services provided by the school's Institutional Partner (SoBRO), such as the after school programs, fundraising for financing the purchase of instructional materials, teacher training, etc. Thus, the Board will oversee continually the services provided by the Institutional Partner, and at intervals throughout the year will measure the effectiveness of the jointly planned projects (community outreach, fundraising, and after school programs for students and families) and the value gained against the cost. It will use information gathered from employees, reports from the Principal, and other data, including progress towards fundraising goals to evaluate the ongoing relationship with SoBRO and whether it should be modified or continue.

f. Partner with low-performing, local public schools to share best practices:

In meetings with the Superintendent of CEC 7, Yolanda Torres, the planning team discussed a variety of ideas aimed at introducing the proposed school to the community and the schools in the area. The Superintendent is implementing a long-term district-wide initiative: Reading, Writing, Thinking Green. She invited us to participate in the launching event for the Day of Writing in October, where we could present examples of writing strategies used in Montessori classrooms. We also agreed to provide workshops for parents on ways they can participate in and enhance their children's education. These workshops would be presented at various locations: schools, libraries, and at SoBRO, and would be presented in English and in Spanish. Ms. Torres also invited us to attend various CEC meetings over the next few months, where she hopes several Principals from schools in the area will also attend. The lead applicant and the proposed Instructional Coordinator have extensive experience in teacher education and designing and presenting parent workshops. It is our intention to develop this relationship with the school leaders in the area to share our experiences and expertise with them, providing workshops for teachers on topics such as reading and writing across the curriculum, writing strategies, use of concrete materials to enhance understanding of math concepts, and classroom management. We also hope that through these relationships we can draw on their experiences working with ELL and Special Education students in the district, in order to inform the plans and practices of the NYCMCS for these students.

g. Demonstrate the ability to overcome start-up challenges to open a successful school through management and leadership techniques.

Both the school leader and the proposed Instructional Coordinator have had previous experience in setting up and running successful schools. As mentioned before, the school leader can count on support and advice from the Montessori community on school start-up. The board is actively involved in the school set-up and can bring to bear its combined expertise to resolve the challenges of opening a successful school. Our Institutional Partner, SoBRO, will provide important support during this period as well. It will provide assistance in finding a location, space for holding meetings and interviews, fundraising and grant applications, and contacts with community leaders and families. SoBRO has an excellent track record in providing these and other services in its own programs and to other schools in the Bronx.

Addressing the challenges inherent in a start-up process will require a great deal of work on the part of the planning team and the board, especially considering that funding may be limited to grants and private fundraising. Successful management will require an appropriate startup and operational plan. The board

and planning team have already begun to structure such a plan which will define the goals and activities, assign responsibilities and roles, establish a timeline and include evaluation procedures for monitoring the execution of the plan.

Other challenges the school will encounter during this start-up phase will include: recruiting, hiring, and training teachers and staff; location and renovation of a school site; classroom set-up and purchase of materials; recruitment of students; financing and financial planning for the start-up period. The startup and operational plan will address all these challenges in the following ways:

Recruitment and hiring. The functioning of the school will depend more than anything on the recruitment, selection and hiring of highly qualified, duly certified and experienced teachers and other staff. To guarantee that highly qualified teachers apply to the school, the NYCMCS budget contemplates the provision of salaries above or commensurate with those offered by public schools. Plans for the recruitment process will begin with advertising in appropriate print and web media, and making contact with professional organizations, training programs and universities. Detailed job descriptions have been drawn up for use in the selection process. Guidelines for the selection process include criteria and methods for resume analysis and credential verification, and an interview protocol. At least four Montessori-trained or experienced (or teachers-in-training) will be selected and hired for the first year.

Teacher training. It is essential that all teachers be able to create appropriate academic plans based on the Montessori approach, the school's ELL model, and practices for students with disabilities,. They must also ability to apply the school's assessment system and classroom management techniques. Therefore, the NYCMCS will plan professional development workshops in all these areas and provide them to the selected teachers during the preparation period, as well as a program of ongoing professional development throughout the year. It will also prepare a Curriculum and Assessment handbook that gives guidelines for academic planning and the use of the assessment toolkit. For teachers who do not have Montessori certification, the budget includes provisions for Montessori training.

Location and renovation of site. With the assistance of SoBRO, the NYCMCS planning team has identified several possible locations in the area that will meet the needs of the school and has embarked on preliminary discussions with some owners. However, all the locations will need at least one year for build out. Therefore the team has been researching and discussing arrangements to find a temporary location that will be affordable for the first year, and plans for a long term lease for a larger location as the school grows.

Classroom set-up. Conversations with Montessori materials providers have informed us that they have experience with new school setups and can put together entire classrooms of materials and furniture and deliver them as soon as the location and funds are available.

Recruitment of students. (Plans for this are explained at length elsewhere in this application. See II.B.)

Financing and financial planning for the start-up period. The school has applied for a start-up grant and with the support of the grant writing expertise of SoBRO will apply for other grants to finance the activities contemplated in the start-up plan. In addition, the school leader, Board members, and SoBRO have connections to private sources that will be approached for donations. The planning team has also has developed a sound financial management plan to monitor and control its finances and ensure fiscal health and viability. This plan includes the preparation of annual budgets and cash flow statements, beginning with the start-up of operations and continuing for ongoing years. Ongoing monitoring will include comparing budgets to actual results of operations, requiring periodic fiscal reports and retaining a licensed certified public accountant (CPA) to audit and report on the financial statements. A strong system of

internal controls will ensure assets are protected, laws are complied with, and valid and reliable data are maintained and reported.

Finally, the planning group has created a clear organizational design, in which the functions and accountability of all members are delineated in precise job descriptions, accompanied by a clear reporting and oversight structure.

h. Demonstrate the support of the school district and the intent to establish an ongoing relationship with such district:

NYCMCS's Institutional Partnership with South Bronx Overall Economic Development Corporation (SoBRO) is an important aspect of the school and will determine its location, since we intend to work closely together in providing parent workshops, student internships, family support, and after school programming for the school's children that will include tutoring, enrichment activities, arts programs, physical education, and supervised play time. For the first time, SoBRO is extending its services to an Elementary program, and everyone in the organization, including the CEO, Philip Morrow, has enthusiastically supported the school. Two of the members of the founding Board of Trustees are SoBRO employees.

SoBRO is a non-profit, community based organization which offers a wide range of services to the community, such as development of affordable and special needs housing, development of /commercial space, assistance to local businesses, training and technical assistance to small businesses in their early stages. It also offers a wide range of services for middle and high school students and young adults that include tutoring, college application assistance, theme based arts programs, GED preparation courses, counseling, community service projects job placement for youth and young adults in the South Bronx. In addition, SoBRO has an Adult Education and Career Development Program that offers work-readiness, career counseling, and vocational training for adults. The partnership between SoBRO and the NYCMCS will provide multiple opportunities to reach out to the community, conducting meetings, forums, and information sessions.

SoBRO's important position in the community has opened many doors for us. We have obtained the strong support of many stakeholders and leaders in the South Bronx community, including community organizations, elected officials, and families. We have attended several Community Board meetings, where we introduced ourselves and talked about our partnership with SoBRO. We had the opportunity to talk to Community Board members and leaders about the advantages of the Montessori approach with a diverse range of children, including English Language Learners. This resulted in enthusiastic support and interest.

The NYCMCS has reached out to key community constituents to inform them of the charter school planning process and the particular model and services the school hopes to provide with SoBRO, and to enlist their support going forward. Members of the planning team and a representative from SoBRO who intends to be on the Board of Trustees of the school have met with and made presentations at Community Board meetings, and with Jesse Mojica, Education Secretary for Bronx Borough President, Ruben Diaz, Jr. They have expressed their interest in the school, and are interested in following the progress of the application. The CEO of SoBRO has long-standing relationships with many important elected officials, and has made personal phone calls on our behalf.

The response from these community leaders and institutions has been overwhelmingly positive, and the leaders of the NYCMCS will continue to communicate and work cooperatively with these individuals and organizations to achieve the objectives of the school. The planning committee has contacted several Day Care Centers in the area and JCCA (Jewish Child Care Association), and will make presentations to families and foster parents to inform them of the school's plans to open a charter school in the area in the

coming weeks. In addition, there is great interest on the part of Day Care Center owners and directors, as well as other schools in the area, in the creation of after school and summer programs for young children.

In conversations with the superintendent of School District 7, the school leader mentioned that she had approached CMTE (Center for Montessori Teacher Education) and AMS (American Montessori Association) for advice and they had discussed the possibility of using the NYCMCS as a training center and internship placement for future Montessori teachers interested in working in urban schools. The superintendent showed interest in this proposal since it would offer professional development opportunities for local teachers. She also expressed interest in informing the schools leaders and teachers in the district about the Montessori approach. Finally, the NYCDOE has shown its support for the NYCMCS's model by sponsoring the school's application to the SED.

i. Provide access to viable education alternatives to students in regions where there are a lack of alternatives:

At a time when student performance is at risk, the NYC Montessori Charter School offers much-needed choice for the south Bronx, an area with great socio-economic diversity and students with a broad range of learning styles and needs, with few options for alternatives to the existing public schools. The educational program and individualized approach of the Montessori method differ from those of the majority of schools in the area and have a well-proven track record with children of all skill levels.

The school will improve its viability by integrating families to become active participants in the education of their children. This will be done through frequent contact with families in individual meetings, workshops, classroom visits, frequent written notices and newsletters, and presentations, ensuring that communication is open and continuous. After school classes for families will enrich their own education as well. In an area where a large percentage of the adults lack education, offering opportunities for their participation in the school will also increase parents' commitment to the school.