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## **Lowcountry Montessori School's Mission Statement**

Lowcountry Montessori School's mission is to increase access to an authentic Montessori-based education. Our staff and parents will collaborate to foster the development of independent, well-rounded, academically-prepared and responsible citizens. LMS is committed to creating an environment that inspires children to become lifelong learners and creative problem solvers for the 21st Century and beyond.

## **Executive Summary**

Lowcountry Montessori School (LMS) will utilize Maria Montessori's method of a multi-aged classroom which allows children to collaborate and to share knowledge with their classmates. The Montessori curriculum encourages children to become highly motivated, independent, self-confident and self-disciplined, ensuring each child has the optimal opportunity to reach their fullest potential. Educating the whole child will be the foundation of Lowcountry Montessori School's experience.

Lowcountry Montessori will provide an educational service to children in the state of South Carolina. The school will serve children from first grade through ninth grade for the first year and then grow to accommodate through high school by the fourth year. At full capacity the Lowcountry Montessori School will house 384 students grades in first through twelfth.

Students at LMS will be grouped into Lower Elementary (grades first through third), Upper Elementary (grades fourth through sixth), Middle School (grades seventh through ninth) and High School (grades tenth through twelfth). Each section is part of a three year cycle.

It is projected that LMS will open its doors with one hundred and seventy four (174) students. This will include first through ninth grade. Each classroom will house 24 students with the exception of middle school, which will house 27 each. The school will expand one grade level each year and expand through twelfth grade. Please refer to the Student Enrollment Projection Form in Appendix L view children per grade level, number of teachers and assistants needed and number of classrooms for each level of our program.

According to the Coalition of Essential Schools, over 100 research studies have shown that students in small schools do better in every area of student attitudes, including attendance and graduation rates, attachment to school, extra-curricular participation, and disciplinary incidents. It also states that their academic achievement goes up in test scores, grades and critical thinking skills. The benefits of small school size go hand and hand with flexible teaching practices, such as teaching teams, multi-aged grouping, cooperative learning, alternative assessments, and an experiential learning focus. These practices are the hallmark of the Montessori classroom and will provide the sense of community which will foster the same sense of stewardship and responsibility outside of the school both now and as they reach adulthood. Typically small schools give students more responsibility for their own learning. Student attitudes towards school in general and toward particular school subjects are more positive in small schools. Students have a greater sense of belonging in a small school. Minorities are even more positively impacted by attending small schools. Lowcountry Montessori will be a small school of 384 students from first through twelfth grade. Our middle school will house 96 students.

By incorporating community service throughout the curriculum, Lowcountry Montessori School will strive to teach children how to live within a community and how to be contributing members of society; this is a key driving component of the Montessori curriculum. The Montessori method encourages children to see the world from a global perspective and the curriculum encourages the child to be a part of the community.

Another unique feature of Lowcountry Montessori is the Spanish enrichment component. In each classroom at LMS, either the lead teacher or the assistant will be fluent in Spanish. The children will have the unique exposure to a staff member that speaks Spanish at least 30% of the time.

Lowcountry Montessori will create an environment that mimics real life scenarios. With the development of the Middle School and High School programs, students will run a business as part of the curriculum. Thereby students will learn, in a hands-on manner, market research and analysis, accounting, production of a product, and service accountability.

A central feature in the curriculum will be the Land Lab, which will serve as a laboratory where all LMS students can conduct scientific research on the natural world. In the land lab, middle and high school students will produce organically grown food for use in the kitchen and food labs. The Land Lab will be available for use as a tool for all areas of curriculum, utilizing experiential learning to develop the whole child.

### **Evidence of Need and Support**

The need for a Montessori charter school in Beaufort County is indeed great. Our Charter Planning Committee's outreach to the community thus far has been extremely well received (as the provided evidence shows). There are many families who are eager to see more

public education options within our area. Recently-developed charter schools in Beaufort County have helped to minimally relieve the public pressure for educational diversity in our area, but many families who wish to send their children to a charter school still have to wait years before acceptance. For example, Riverview Charter School, established in 2009, still has a waiting list of over 500 students in grades first through eighth; its Kindergarten has 131 students on the wait list. This is an average of 63 students presently waiting for an opening in a given grade level. Bridges Preparatory School, opening this fall (2013), has a state-sponsored charter, and has already filled their 360 spots and has a waiting list of 133 students. Altogether, these two charter schools alone cannot currently keep up with the demand for alternative schools of choice in the Beaufort and surrounding areas. The families who seek a free Montessori education over a traditional one have little access to it. Unfortunately, due to the overwhelming need for more charter schools, some local schools require prospective students to enter into a lottery that is weighted upon ethnic and financial backgrounds. Even after looking at all these numbers, the simple truth exists that Beaufort County has yet to establish a Montessori charter school. Furthermore, only one charter school in Beaufort County will accommodate students at the high school level.

Beaufort County School District established a public Montessori magnet program in 2011 that accommodates 50 elementary-aged students; however, this program only covers the elementary level through fifth grade, and more students are on a waiting list than there are students who are actually enrolled. Several successful private Montessori schools exist and include toddler and early childhood levels but enrollment is below operating level, because the demand for a free elementary, middle and high school education is so great in today's economy.

To address these overarching issues in our local educational system, Lowcountry Montessori's program provides a free Montessori education for the elementary, starting at first grade, through high school levels. Our program would create an avenue for children who graduate from lower-level Montessori programs (private and public) to continue their Montessori education at no cost. Lowcountry Montessori also accommodates students who are currently challenged in traditional school environments and need or desire an alternative, as well as families who are simply interested in experiencing the difference of a Montessori education.

Shannon Erickson, SC House District 124 has publicly offered her support to Lowcountry Montessori. Additionally, Beaufort Mayor Billy Keyserling has also expressed his willingness to write a letter of support for Lowcountry Montessori.

CBC Bank in Beaufort County has agreed to partner with Lowcountry Montessori School, allowing our committee the use of their office space for planned committee meetings in the next several months until we acquire a permanent space. Moss, Kuhn and Fleming, P.A., has also agreed to partner with Lowcountry Montessori. A private law firm in Beaufort, it has provided pro bono legal services, and administrative assistance to LMS. In addition we a partnership with Hanger Clinic. Hanger Clinic has agreed to help promote Lowcountry Montessori throughout the community.

**Charter Formation:** Dedicated parents, teachers, and community members came together in an effort to create a free public Montessori school for children in the Beaufort and Jasper County areas. The mission which spurred this collaboration was the drive to offer an authentic Montessori program to as many children as possible. The committee realized that most children do not have access to this method of education, especially those who cannot afford a private

education. With this understanding, the committee began to make preparations to implement the program with the development of a free public Montessori program.

**Outreach:** Lowcountry Montessori has been out in the community doing outreach in all areas of Beaufort and Jasper counties. Members of our committee have dedicated many hours of their time doing outreach at a large and diverse number of events and places. At these events, committee members have shared information on Lowcountry Montessori School, provided examples of Montessori materials used in the classroom and handed out pamphlets describing the Montessori method. LMS committee members have had informational sessions at the Boys and Girls Club, Tidal Creek Fellowship, shopping plazas, flea markets which serve largely Hispanic and African American populations, Black Chamber of Commerce of Beaufort County, YMCA, Wal-Mart, the local library, Beaufort County Public Defenders Office, Beaufort County Office of South Carolina Department of Juvenile Justice, Community Bible Church, Habersham Farmer's Market, Port Royal Farmer's Market, Sports Academy Gymnastics, and PALS (Parks and Leisure Services). Additionally, the committee has contacted local newspapers to garner media coverage to further inform the community of the advent of LMS as an option for Beaufort and Jasper area students.

During this outreach, we have received more than 700 signatures of support for LMS, evidence that the concept of Lowcountry Montessori School has been well-received in the community (See Appendix B). We have received signatures from a large number of Spanish-speaking community members, and we are fortunate to have on our committee an individual who speaks Spanish fluently. This has been an invaluable asset in our outreach with the Hispanic Community here in Beaufort and Jasper County areas.



The Committee has scheduled additional outreach in the next few weeks at many events, including Taste of Beaufort, the Gullah Festival, Tabernacle 5K run, Tabernacle Baptist Church, Beaufort YMCA, Beaufort Boys and Girls Club, and Hilton Head Boys and Girls Club.

**Charter School Planning Committee**

**(See Appendix A)**

**Amy Horn: Planning Committee Co-Chairman**

**Ex-Officio Member on all Subcommittees**

Amy Horn is a parent of three Montessori children. She is also a parent of a public school child. She currently works as a Lower Elementary School Teacher. She has a Masters of Education in Health Promotion and Behavior, a certificate in Educational Leadership, a Bachelors of Education in Health Promotion and Behavior. Amy also holds her Lower Elementary Certification in Montessori education.

**Eve Fleming: Planning Committee Co-Chairman**

**Ex-Officio Member on all Subcommittees**

Eve is a parent of a Montessori child and a private school child. She is on the Board of Directors at EC Montessori. She has an ABJ (Bachelors in Journalism) and Juris Doctor.

**Katherine Winn: Finance Committee**

Katherine is the grandparent of a Montessori child. She has a Bachelors of Business Administration in Accounting. She is an IT specialist and has done numerous works in financial and job cost accounting.

**Warren Engle: Facilities Committee**

Warren is a parent of a Montessori child. He has a Bachelors in Management and Marketing. He has owned and operated his own construction company and managed a national building

supply company, worked with historic preservation, renovation and construction in both residential and commercial markets.

**Karl Schlobohm: Education Committee/Facilities Committee**

Karl has a Masters of Education in Integrative Learning with a Montessori emphasis, a Masters of Arts in Literary Studies, a Bachelors of Arts in English and Montessori Certification in Secondary I & II. He is fluent in Spanish, an avid writer with editing as well as technical skills.

**Ronda McElveen: Marketing/Public Relations Committee and Governance Committee**

Rhonda is a parent of two Montessori Children. She has an Associate Degree in Nursing, is on the Board of Directors of EC Montessori and works for Tidewater Hospice. She volunteers at Jasper Animal Rescue Mission.

**Kotina Forbes: Education Committee/Outreach Committee**

Kotina is the parent of a Montessori child. She is also the parent of a child in parochial school. She has an Associates degree and is a Graduate of the Aeorographer's Mate/Weather Forecaster School for the United States Navy. She is also an advocate for learning different children and a parent of an autistic child.

**Laura Lopresto-McKeown: Education Committee/Outreach Committee**

Laura is a Montessori Teacher and has a Montessori certification in the primary and lower elementary. She has been an educator for over 15 years.

**Pia Webb: Outreach Committee and Governance Committee**

Pia has a Bachelors in Science in Nursing and a Doctorate of Nurse Practice. She is a registered nurse and the parent of two Montessori children.

**Mark Vanderpool: Finance Committee**

Mark has a Bachelors of Business Administration and is the parent of a Montessori child. Mark has several years experience as a grant writer and has over 20 years of experience in systems, financial services, human resources and management.

**Jennifer Dunn: Finance Committee**

Jennifer is the parent of two Montessori children. She attended the University of Connecticut and USCB and studied English and Biology. She has experience in human resources, accounting, food service, sales and management.

**Andrea Evans: Outreach Committee**

Andrea is the parent of a Montessori child. She has a Bachelors in Biology and a minor in Chemistry. She also has a Doctorate or Dental Medicine.

**Enrollment**

The targeted population for LMS is Beaufort and Jasper County children in grades first through twelfth grade. Efforts have been made, and will continue to be made up until and after opening of the facility, to conduct outreach to areas in these counties so that the LMS student body reflects the diverse cultural and socio-economic make-up of the surrounding areas. Such efforts will continue to include media coverage, personal contacts, community meetings, and school presence at events. Racial and cultural diversity is celebrated in the Montessori classroom and LMS will be diligent in it's outreach effort in order to ensure that the student body has a richly diverse staff and student body.

The community will receive information about the formation of a new charter school and any upcoming lottery and enrollment deadlines through newspaper articles, posts around town, radio announcements, website, and the information bulletin in town.

**Receipt and Processing of Applications Once approved:** LMS will begin to accept applications Fall 2014 upon approval of charter until January 15th, 2014. In subsequent years, LMS will accept applications between October 15th and January 15th for the following school year. They will be processed in the following ways:

Postal mail: Prior to Year 1 implementation, applications for enrollment may be mailed to Lowcountry Montessori School. In subsequent years, applications may be mailed to the LMS facility. LMS personnel will collect postal applications and date them according to postmark.

E-mail: After Year 1 implementation, applications for enrollment may be e-mailed to LMS at [info@lowcountrymontessori.com](mailto:info@lowcountrymontessori.com). In subsequent years, applications may be e-mailed to a LMS address designated by the Head of School. LMS personnel will print a copy of emailed applications and date them according to date sent. The email system tracks date and time of submission. On-line: An on-line application may be available in subsequent years at [www.lowcountrymontessori.com](http://www.lowcountrymontessori.com). LMS personnel will print a copy of on-line applications and date them according to date submitted. The on-line system will track date and time of submission.

In person-on-site: After year one of implementation, LMS will accept applications on site. The Head of School will designate personnel who will collect applications and date them according to date of submission.

\*LMS will notify parents either by US Mail or email confirming the receipt of the application. Any applications received after January 15th will be considered on a first- come/ first-served, space-available basis.

Priority Enrollment and Conduct of Drawing: If the number of applicants exceeds the number of available slots, a drawing will be used to determine who gains admission. All applicants who would like to attend LMS must submit an application prior to the published deadline. Any applications received after the published deadline will be placed at the end of the wait list in the order of which they were received. Any students drawn after all seats are filled in a particular grade will be placed on a wait list in the order they are drawn. The drawing will be duly publicized and conducted in a public meeting. All priority preferences will be considered in the following order:

1. child(ren) of the LMS Planning Committee member, as long as it does not exceed 20% of the total enrollment for that year
2. child(ren) of LMS employees
3. applicant sibling(s) of a currently enrolled and attending student
4. applicant sibling(s) of an accepted applicant applying for the same academic year

Priority enrollment for children of LMS employees and children of the charter committee cannot constitute more than 20% of the enrollment of the charter school. Siblings who are applying for the first time will receive preference only after one of the sibling(s) has been drawn. A student is only considered to have priority status in year one of his/her attendance. Therefore in subsequent years, that student is considered as already enrolled and will not count towards priority status.

Planning Committee members' children have priority for enrollment throughout the duration of the ten-year charter. If a member moves more than 100 miles from the district and

then moves back to the area within the ten-year charter, he or she has the priority of re-enrolling his or her child.

**Lowcountry Montessori School Lottery Process:** The drawing will proceed as follows: For each applicant, LMS personnel will create a lottery card with applicant's drawing number. A.) the name of the student; and B.) sibling(s), if applicable; and C.) Sibling(s) grade. This card will be distributed to the family at least one week prior to the lottery procedure.

\*All information on the drawing card will be verified by LMS personnel against the application.

1. Each individual card will be placed in an envelope. The outside of the envelope will note only the grade level for which the applicant applied.
2. Each envelope will then be placed in a corresponding large, transparent container marked with each grade level. The envelopes will be thoroughly shuffled. The containers will be stored in a secure locked location.
3. First grade will be drawn first and then each of the other grade levels will be put on a card and placed into an unmarked envelope. These envelopes will be placed in a transparent container.
4. A community representative, not associated with LMS, will then draw from the container to establish the order in which grade levels will be drawn.
5. Once grade level order has been established, the representative will then proceed to draw from the first chosen grade level and continue until all cards are drawn.
6. Each envelope will be opened and the applicants drawing number will be called out and placed on the board. The number and name will be recorded on an independent tally sheet.
7. This will continue until all envelopes have been drawn for that grade level.
8. Once all available seats have been filled, the process will continue with the rest of the applicants going on a wait list in the order they are drawn.
9. In the event that a student is drawn in a subsequent grade level, is eligible for a slot and has a sibling on the wait list in another grade, that sibling would move up to the appropriate spot on the wait list.
10. This will be repeated for each grade level until all grades and all cards have

been drawn. Following the Drawing and within 10 business days, LMS will send out Enrollment Packages to all students who were picked in the drawing. Students will then have 10 business days to return the Enrollment Package. The envelope must be postmarked accordingly to be accepted. Any Enrollment Packages that are received late or are not returned to LMS will constitute that slot being offered to the next child on the wait list.

\* The lottery process may change if the school decides to do an electronic lottery, which we are currently investigating.

**Students Outside the District:** Because LMS is seeking sponsorship through the South Carolina Public Charter School District, there will be no out-of-district students.

**Student Appeals Process:** The drawing will be the final and binding result for admission. In the event that LMS denies admission to a student for reasons other than the result of the drawing, the student may appeal to the governing board of Lowcountry Montessori School. In the event that a suitable resolution cannot be decided, then the student may appeal to the SC Public Charter School District Board of Trustees. The appeal to both groups must be within 10 business days in writing and state the grounds on which the appeal is based. The decision of the SCPCSD shall be binding and final without the right of appeal (Section 59-40-50(c) (1)).

### **Educational Program**

Montessori is a presence in more than 400 U.S. public schools, including neighborhood, magnet, and charter schools. There is a small but growing body of well-designed research comparing Montessori students to those in traditional schools. These suggest that in academic subjects, Montessori students perform as well as or better than their non-Montessori peers. In one study, for example, children who had attended Montessori schools at the preschool and elementary levels earned higher scores in high school on standardized math and science tests. Another study found that the essays of 12-year-old Montessori students were more creative and

used more complex sentence structures than those produced by the non-Montessori group. The research (See Appendix G) also shows Montessori students to have greater social and behavioral skills. They demonstrate a greater sense of fairness and justice, for example, and are more likely to choose positive responses for dealing with social dilemmas. By less stringent measures, too, Montessori students seem to do quite well. Most Montessori schools report that their students are typically accepted into the high schools and colleges of their choice. And many successful graduates cite their years at Montessori when reflecting on important influences in their life. ([www.AMShq.org](http://www.AMShq.org)) Additionally, in a study conducted by Angeline Wollard and published in Science Magazine, results showed that students in a Montessori magnet program did better on standardized tests, were more creative and had a greater sense of community. The study followed the students for three years. And a longitudinal study of high schools in Milwaukee Public Schools showed that high schoolers who had been enrolled in a Montessori program from the ages of 3 to 11 years old outperformed the other students in math and science. Additionally, a study by Rathunde and Cskszentmihalyi found that students in Montessori schools had a more positive engagement in school. This research is evidence that a Montessori curriculum serves *all* children in all areas. LMS believes that this type of curriculum should be available to all of our children, not just those able to pay private school tuition. And students who better academic performance and greater social and behavioral skills, as produced by the Montessori curriculum, will obviously be more productive citizens.

**Areas of Instruction for Lower and Upper Elementary:** Students will achieve mastery in the following areas of instruction: *language* (includes reading, writing, poetry, spelling, creative writing, grammar, research, memory games, word study, sentence analysis, and library skills);



*science* (includes biology, botany, astronomy, physical science, ecology, geology, zoology, and earth science); *mathematics* (includes systems of numeration, algebra, fractions, geometry, memorization of facts, decimal systems, basic operations, measurement, and problem solving); *cultural studies* includes geography, history, zoology, geology, anatomy, ecology, music, art, art history, drama and botany. Additionally, a Spanish enrichment component will be implemented in all classrooms. Either the assistant or lead teacher will be fluent in Spanish, and will speak primarily Spanish to the students. “Going out” also plays an important role in the Elementary Program, with the children themselves often planning the field trips based on their interests.

**Key components of Lowcountry Montessori’s Educational Program:**

- a. Mixed-aged classrooms are essential. This promotes collaboration as opposed to competition, and also allows children to move through the curriculum at their own pace.
- b. Children, not teachers, will be the focus at LMS. LMS teachers will be especially capable of “following the child,” adjusting strategies and timetables according to the needs of individual students. Children will receive lessons based on their readiness for the lesson, not on their age. Each child will follow his educational path based on his own interest and ability level.
- c. The classroom atmosphere at LMS will be warm and relaxed. The Montessori environment is meant to feel more like home than school. Tremendous attention is paid to creating a safe, secure, orderly environment where children feel in control of their own daily routines, are free to work alone or together, and work in partnership with their teachers who are more like mentors or coaches than authority figures.

- d. Daily schedules at LMS will be flexible (See Appendix E). In collaboration with the teacher, students develop their weekly work plans, which they will complete by the end of the week. Students are then expected to schedule their own work each day, which instills time management skills and accountability early in their development. This method teaches that education is enjoyable, fosters a love for life-long learning, and produces responsible, independent adults.
- e. Continuous and careful observation and evaluation of the students progress allows LMS teachers to consistently address the needs of struggling students.
- f. Children and adults at LMS will work together as a cooperative group. Much like in a family, everyone works together to help meet the collective needs of the group. Older students in a Montessori classroom are expected to help with the care of the physical environment as well as the care of the younger children. Through modeling and teaching what they've learned, knowledge and good social skills are reinforced in the the older children.
- g. Interactions between students at LMS will be cooperative and collaborative, rather than competitive. Montessori teachers are trained not to compare students to one another and the working relationship among classmates is collegial and collaborative. It is not unusual for children in a class to celebrate when a peer “gets” a work for the first time or masters a new material.
- h. Each LMS classroom will be a meticulously-prepared environment, with classroom materials organized in such a way that children can choose their work freely. A wide variety of work will be made available to match an equally wide variety of interest and

ability levels among students in each class. Classrooms will be set up to invite inquiry and discovery. Classrooms at LMS will continuously change to meet students needs.

- i. Individual development and progress will be a constant focus in the classroom. While each student will be an important part of the community of learners, each student will also be treated as a unique individual. LMS teachers will carefully monitor and track each student's development, and gently guide each student to take the next step as he or she demonstrates readiness.
- j. Learning activities will be hands-on. Maria Montessori stated, "Education is a natural process carried out by the child and is not acquired by listening to words but by experiences in the environment." Whenever possible, LMS students will have direct, personal hands-on contact with either real things under study or with concrete models.
- k. Learning activities will be spontaneous. Learning activities at LMS will involve the most freedom possible within reasonable and safe limits.
- l. Learning activities at LMS will be self-correcting. The specially designed materials with which they will work will have control of error built in. Students will receive immediate feedback on their progress.
- m. Students will gain self-confidence in their abilities. Teachers at LMS will break lessons down into logical segments. Each new task will be presented with precise direction and clear demonstrations. Tasks will typically be presented in a logical sequence, so that each new task builds on a task children will have already mastered. As a result of clear, simple instructions and logical sequenced activities, student confusion and uncertainty will be minimized, and students' confidence in their abilities to learn will continuously increase.

- n. Students will learn to be good stewards of the environment and to accept individual responsibility for the beauty of the land and the health of our ecosystems.
- o. Universal values will be taught. Beyond teaching children polite behavior, LMS will seek to instill in each child basic universal values including self-respect, acceptance of the uniqueness and dignity of each person we meet, kindness, peacefulness, compassion, empathy, honor, individual responsibility, and courage to speak from the heart.
- p. The curriculum will be international in heritage, focus, and perspective. Students representing diverse social, economic, and cultural backgrounds will be enthusiastically welcomed at LMS. The curriculum will consciously promote a global perspective.
- q. Social responsibility will be developed through community outreach programs allowing children and adults to make meaningful differences in the lives of others.

**Guidelines for Montessori in the Public School Sector :** In addition to incorporating each of these essential elements identified as part and parcel of any authentic Montessori program, LMS will also align its curricular and administrative strategies with a standards document designed for public Montessori schools. Aptly called “Essential Elements of Successful Montessori Schools in the Public School Sector,” this document has been agreed upon by the three major Montessori organizations in the United States, namely: American Montessori Internationale - United States, American Montessori Society, and the North American Montessori Teachers Association. This document, which is presented in the Appendix, provides guidelines for Montessori teachers, administration, recruitment and parent education, curriculum/environment, assessment, and professional development.

**Middle and High School Educational Program:** The Lowcountry Montessori School

Secondary Program (middle and high school) represents an integration of South Carolina core standards and educational requirements, the most current research on the developmental needs of adolescents, the Montessori approach to education, research-based learning theory and teaching methods, and the predictions of the skills needed to lead a productive life of continuous learning and cooperation. Consistent with all Beaufort County schools, Lowcountry Montessori seeks to provide the environment and experience that will allow student to flourish academically to the point of exceeding state standards of academic achievement; however, our overarching goal as educators is to help our students develop into independent, responsible, critical, and compassionate individuals. This coincides with Maria Montessori's vision for education as a system that allows students to physically access the world, and in turn, to develop into charitable stewards of their environment and community.

Adolescents operate at a crucial stage in developing the social skills necessary to acquire a true capacity for compassion, empathy and understanding – the foundation for peaceful dialogue and cooperation that is the vision of Montessori. Nonetheless, very few Montessori secondary programs exist - let alone public programs. This is why Lowcountry Montessori School acknowledges its secondary program as the cornerstone for its success within the State and within Beaufort and Jasper Counties. Only one secondary Montessori program exists within Beaufort County (Sea Pines Montessori of Hilton Head), which only includes Middle School and is private; none exist in Jasper County. Lowcountry Montessori School's program would not only become the pioneer for Montessori high school in Beaufort County, but would also extend Montessori secondary education to the public sector.

The Lowcountry Montessori School middle and high School programs will operate within the framework established by Dr. Elisabeth Coe’s School of the Woods (Middle and High School) in Houston, TX – the first Montessori Middle School program accredited by AMS (The American Montessori Society). However, we recognize many differences between the setting of School of the Woods and Lowcountry Montessori School, especially in terms of location, student population and background, and the public and private sectors. Therefore, while operating within the framework established by Elisabeth Coe, LMS individualizes its approach to optimally serve the Beaufort and Jasper County communities.

**Lowcountry Montessori “Land Lab”** will be a 10,000 sq/ft community garden run by middle and high school students. This will serve as a laboratory where all LMS students can conduct scientific research on the natural world. Students will learn organic farming techniques and will practice recycling organic waste, water and power in order to create a self-sustaining source of food for their community. All food produced can either be enjoyed by the entire school community in the form of a school picnic, sold as a product in a class business, or donated to a local food shelter.

**Middle School Program:** The middle school program shall operate according to a schedule based on a 5-week cycle. During the first two weeks, students work on Spanish and Natural World. During the second week, students work on Language and Social World. Personal World and Math are the only subjects applied to a daily schedule. During the fifth and final week – “Enrichment Week” – students work on projects and field exercises that not only integrate all subjects together, but also apply those subjects to the broader perspective of a world community. The six cycles within every year exist as a cohesive theme of subject matter. The subject matter

is organized as follows: Math (pre-algebra, algebra, geometry, trigonometry and precalculus); Natural World (the study of science and the natural universe); Social World (the nature and history of human civilization); South Carolina State History; Language (grammar, literature, poetry, study of conventions); and Spanish enhancement.

Additionally, LMS Middle School teachers will create a pool of course electives based on background education and experience, and students will vote for the electives that should be available. Students will also be offered a daily period of reading or journal writing, as well as “Community Meeting” time, a highly-organized, student-run meeting which may involve physical exercise, mental challenges, music listening and study, as well as collaborating with teachers to establish community rules and boundaries. Another unique feature of LMS Middle School is the class business run by the students, who will learn and then utilize their knowledge of currency, economy, marketing and human incentive to earn support for a cause of their choice.

**Ninth Grade:** LMCS ninth grade students are in a unique position in that they operate as leaders in one community of students and simultaneously as inductees within a community of older students. While 9<sup>th</sup> grade students enjoy a leadership position in the Middle School classroom, their curriculum is based on a high school design. They also have plenty of opportunities to work and socialize with LMS High School students and will earn high school credits in compliance with South Carolina State Standards for courses in language, math, natural world sciences, history, and Spanish. Ninth grade students will have a choice of LMS High School electives and will participate in field trips, businesses and community service projects..

\*See Appendix I for middle school Daily Schedule and Academic Calendar.

- See Appendix \_\_\_ for information on “Enrichment Weeks.”

- Course details are included in the Student Handbook, Appendix \_\_\_\_

**High School Program:** LMS High School curriculum will be experiential in that students will participate in internships and other such hands-on experience. We strive to maintain relevancy within our curriculum design and will consistently update its curriculum to suit the preparedness of its students to successfully move forward upon graduation. The LMS High School curriculum is designed to conform to South Carolina state academic standards and to contain subject matter diversity while teaching the interconnectedness of all academic subjects in order to promote systems thinking. High school students will focus on recognizing universal patterns among natural, linguistic, mechanical and other kinds of systems so that they may develop their skills in problem-solving. LMS believes that if students can recognize the interconnectedness of systems within our universe, they will also hold the knowledge and creative tools necessary to become our society's next generation of pioneers and innovators. LMS High School students will earn high school credits in compliance with the state standards, and the curriculum offered will allow all students to meet the South Carolina State High School Diploma requirements. LMS will provide all required courses in the areas of language arts, math, science, history. Spanish classes will meet the foreign language requirements. Course electives will be offered in a variety of different subjects so that the students are free to explore their areas of greater interest; however, some requirements within the electives portion of the student's portfolio will be established. Electives will be available in different subject areas so that students may choose courses that fulfill LMS and state requirements for obtaining a South Carolina High School Diploma. Additional courses will include: *Communication Application*: The class is available for 10th grade students and has two overarching goals: 1) to expand students' understanding of what



communication is and 2) to introduce and to allow students to practice skills that can improve their communicative abilities; *Theory of Knowledge*: An 11th year philosophy course in which students study Western and Eastern thought; *Senior Thesis*: Seniors will conduct a year-long research project based on the topic of “The Future.” A final 25-page paper will discuss their researched idea for the future. This will be required for graduation. LMS High School students will also enjoy Intercession Weeks, where they will engage with their environment and their community through research and service projects.

### **Goals and Objectives**

As is true for each school in the Beaufort area, the overarching goal of Lowcountry Montessori School is to provide an educational experience that will enable all students to meet academic standards set by the state, and prepare them to become responsible citizens and lifelong learners. By definition, however, charter schools must bring something new and innovative to the district in which they aim to operate. In order to justify taxpayer support, charter schools must demonstrate that they provide new opportunities for student achievement which do not already exist in the District. Charter schools, in essence, are the government’s way of stimulating and investing in new ideas in the education marketplace.

The driving force of Lowcountry Montessori School is to provide an exceptional educational experience which will allow all students to excel in academics and standards set by the state and also to prepare them for the global world which we live in today. Montessori Education focuses on developing innovating minds, free thinkers and a love of learning.

**Measurable Goals**

**LMS will assist the SC Public Charter School District in reaching academic excellence, as operationalized by ratings on SC School Report Cards.**

- Goal 1A: LMS will obtain an Absolute Rating of "Good" or higher on SC School Report Cards. In the first and second year of operation, we will obtain an “Average” or “Good” ranking and in subsequent years, we will be ranked “Good” or “Excellent” on our SC School Report Card.
- Goal 1A: LMS will obtain an Growth Rating of "Good" or higher on SC School Report Cards. In the first and second year of operation, we will obtain an “Average” or “Good” ranking and in subsequent years, we will be ranked “Good” or “Excellent” on our SC School Report Card.

**LMS will assist the SC Public Charter School District in reaching academic excellence at the high school level.**

- Goal 2A: 93% of LMS second year high school students will achieve a passage rate on the H-SAP and/or state required assessments on both sections with a score of 200 or better in 2016. The number of second year high school students who pass the H-SAP and/or state required assessments with a score of 200 or better will increase by one percent in the years 2017, 2018, and 2019. For the duration of the charter 96% of second year high school students will pass both sections of the H-SAP and/or state required assessments with 200 or better.

**LMS will assist the SC Charter School District in improving End-of-Course exam scores**

- \* Goal 3A: 77% of students will receive a passing score of 70% or higher in the Algebra I End-of-Course Exam for the first year of operation. The percentage of students passing the exam will increase by 2% each year thereafter for the next four years. By the end of 2019, 85% of students will pass the Algebra I End-of-Course Exam. This percentage will be maintain through the end of the charter.
- \* Goal 3B: 72% of students will receive a passing score of 70% or higher in the English I End-of-Course Exam for the first year of operation. The percentage of students passing the exam will increase by 2% each year thereafter for the next four years. By the end of 2019, 80% of students will pass the End-of-Course Exam. This percentage will be maintain through the end of the charter.

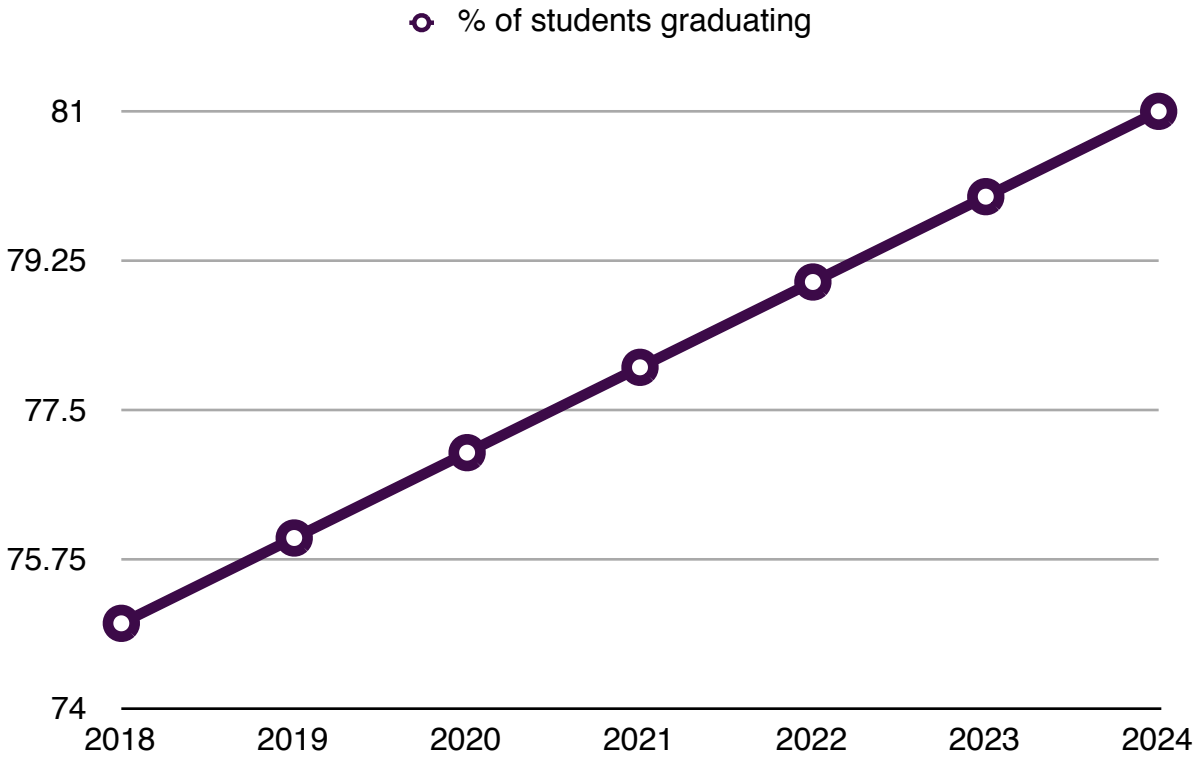
(These percentage points were decided upon by looking at the actual current percentage points of End of Course Exams scores of students in the Beaufort and Jasper County.)

**LMS will assist its community by increasing the percentage of students who graduate within a four year period.**

- Goal 4A: LMS will have a 75% graduation rate in 2018.
- Goal 4B: LMS will have a 76% graduation rate in 2019.
- Goal 4C: LMS will have a 77% graduation rate in 2020.
- Goal 4D: LMS will have a 78% graduation rate in 2021.
- Goal 4E: LMS will have a 79% graduation rate in 2022.
- Goal 4F: LMS will have a 80% graduation rate in 2023.
- Goal 4G: LMS will have a 81% graduation rate in 2024.

Graduation rate is based on the cohort of students who entered the ninth four years previously.

(These percentage points were decided upon by looking at the actual current percentage of students graduating each year in Beaufort and Jasper County schools.)



**LMS will provide a supportive environment for employees, as operationalized by ratings on confidential employee questionnaires. This questionnaire will be developed by the Board.**

- Goal 5A: At least 90% of employees will report satisfaction with the learning environment.
- Goal 5B: At least 90% of employees will report satisfaction with the physical and social environment.
- Goal 5C: At least 90% of employees will report satisfaction with home and school relations.

These percentages will be maintained throughout the ten year charter.

**LMS will be responsive to charter school parents, as operationalized by ratings on confidential parent questionnaires. This questionnaire will be developed by the Board.**

- Goal 6A: At least 90% of parents will report satisfaction with the learning environment.
- Goal 6B: At least 90% of parents will report satisfaction with the physical and social environment
- Goal 6C: At least 90% of parents will report satisfaction with home and school relations.

These percentages will be maintained throughout the ten year charter.

**LMS will provide a supportive environment for students, as operationalized by ratings on confidential student questionnaires. This questionnaire will be developed by the Board.**

- Goal 7A: At least 90% of students will report satisfaction with the learning environment.
- Goal 7B: At least 90% of students will report satisfaction with the physical and social environment.
- Goal 7C: At least 90% of students will report satisfaction with home and school relations.

These percentages will be maintained throughout the ten year charter.

Director will be in charge of distributing surveys and collecting surveys from students, parents and staff. This information from the three above mentioned surveys will be collected, recorded and provided to the SCPCSD no later than July 15th of each year.

In order to meet or exceed the above goals and objectives, LMS will align the Montessori Curriculum to the Common Core State Standards. This will give teachers at LMS the tools and knowhow to make sure the standards are being met in the classroom.

LMS will provide to the SCPCSD the above ratings and scores within 21 days of receipt of said ratings and scores.

### **Evaluating Pupil Performance**

The Montessori Method uses unique assessment tools that are self- correcting; each child accepts responsibility for his/her own education. Feedback is immediate and without judgment, which empowers the child; reinforcing a sense of self- pride.

**Student Achievement and Progress Evaluation:** LMS will use a combination of assessments developed by Dr. Maria Montessori, as well as all standardized test required by the State of South Carolina Department of Education.

**Montessori Inspired Assessments :** The role of assessment in the Montessori classroom is to grant feedback to the child so that they can master the concept presented in the curriculum. Weekly Work Plans will be prepared by the student along with peer feedback. Teachers will monitor student's portfolios, assess completed work, maintain spreadsheets of mastered concepts and observe their progress throughout the year.

**Weekly Work Plans :** The Weekly Work Plan helps the child organize his or her day and makes sure that the child is engaged in all areas of the curriculum. Daily/weekly goals are expected but are different for each individual child. Work plans will be periodically shared with parents.

**Mastery through Repetition :** The Montessori environment provides the child with the opportunity for repetition so that the child can work on the chosen work and repeat the work until mastery is accomplished. This process builds confidence as well as independence and a reduced need for teacher feedback.

**Teacher Observation Throughout the Year:** Observation is an excellent tool for classroom management. By observing how the students interact within the environment and with each other, the teacher is able to change the environment to meet the needs of the children. Every child is an individual, yet an important member of the whole classroom community.

**Student Portfolios:** The Student Portfolio is referenced throughout the year in order to evaluate the level of mastery of a given concept within the curriculum; revisiting an area before moving on is noted. Students will have the opportunity to showcase their work to family and friends during Student Portfolio Night.

**Spreadsheets of Concepts Mastered :** Spreadsheets are used to record the Montessori lessons that have been presented, practiced, improved upon and mastered by each student. Checklists are divided by subject, year and topic of study. These spreadsheets will be used to keep track of each child's progress and aid in aligning the Montessori concepts with the state's academic standards.

LMS will be using a system by the name of Montessori Records Express (MRX). This system allows the teacher to keep records of which lessons have been presented to which child, whether or not the child has been practicing the concept taught and if the child has mastered the concept. The system be used throughout the school to keep accurate records of each child's progress throughout his or her years at LMS.

MRX will assist teacher in communicating accurate evaluation of student progress which will be shared with parents bi-annually.

**Assessing Completed Work :** Assessment of work done throughout the day in the classroom helps the teachers evaluate if the child is grasping the concept. The teacher is also constantly

evaluating completed work. This immediate evaluation of finished products gives the child feedback on the quality of their work; reinforcing pride in their accomplishments and nurturing a positive self-esteem.

**Peers as Sources of Feedback:** Montessori students often work together and often in this setting, they correct each other's mistakes, in the hope of getting it right. Cooperation is the centered focus; not competition; the children are not graded. Montessori students also serve as teachers; children give lessons to each other. The ability to teach a lesson learned, demonstrates pure understanding of that information.

**Standardized Testing :** LMS will use the State standardized testing to assess the areas of strengths and weaknesses and to track student advancement. Students in grades 3-8 will take this test; parents can compare and contrast the results other public schools in their district.

In grades nine through twelve, students will begin taking the South Carolina High School Assessment Program (H-SAP and/or state required assessments). It will be administered in student's tenth year. Subjects will include English/language arts and mathematics. High school students must pass the H-SAP, and/or state required assessments, in order to receive a diploma. This test will give a baseline to measure LMS students to other students in the surrounding area.

**Academic Assistance:** The standardized testing will work in conjunction to make sure that students are performing at an acceptable level for their grade level. If the test suggests otherwise there will be process of intervention. This process is built in in the Montessori Method by teaching, assessing, reteaching or moving ahead, if the child is ready. remediation is a foundational part of the method and will be practiced religiously at LMS. If a child is moving exceptionally slow through the curriculum, this will be an indication that the child needs some



diagnostic and remedial intervention. If this is the case, a team of professionals and parents will meet to review the appropriate interventions. A written plan will then be put into place. This plan will include the type of intervention, dates to begin, and checkpoints for examining results and outcomes related to the child's learning. Interventions can include the emotional, physical and social realms as well as academic. This incorporates the idea of teaching the whole child. Discussion of RTI (Response to Intervention) is also addressed in the Serving Students with Special Needs and Evaluating Pupil Performance.

Interventions are to include, but not limited to vision, hearing, and speech screenings, behavioral plans monitored by home and school, sessions with counselor for emotional issues. Academic interventions are to include more one-on-one time with teacher, shortened length of assignments, breaks for activity, and using cues from student on how they learn best and using those techniques when giving lessons.

If these techniques do not produce positive outcomes, other interventions will be tried and/or recommended. Diagnostic tests may be recommended to rule out a learning difference. If the child qualifies for special services, then the procedures of the "Individuals with Disabilities Act" would be put in place. If these procedures can be carried out at LMS, the child could remain at the school and receive the services. -If LMS is unable to provide these services, an IEP team will meet to discuss the placement where FAPE, (Free and Appropriate Public Education), can be obtained.

### **Serving Learning Different Students**

Maria Montessori first developed the method in order to meet the needs of children who were learning different. She was told that the children she first worked with were “unteachable”. She found through much observation and trial and error that every child had the capacity to learn in given the proper materials and a prepared environment.

LMS will have a full time special education teacher in place the first year of operation. LMS will comply with all aspects of child find from referral through eligibility. The school will publicly post information regarding the child find process.

Lowcountry Montessori will use the inclusion model with learning different students and pull them out of the classroom for services if needed. LMS will contract with the appropriate related service providers, including but not limited to PT, OT, speech and psychologist for testing in the manner necessary to afford children with disabilities an equal opportunity for participation in school activities.

LMS also understands the requirements of the Individuals with Disabilities Education Improvement Act (IDEA) of 2004, Section 504 of the Rehabilitation Act, the Americans with Disabilities Act, and Title III of the Elementary and Secondary Education Act (ESEA) and plans will comply with these requirements, which includes appropriately certified personnel, documentation, assessments, adaptations and modifications.

Regarding IDEA 613(e) (1) (B), LMS will comply with all federal and state laws regarding accommodations for students with disabilities and will not discriminate against individuals who are believed to have disabling conditions. The school will adhere to the criteria for eligibility, reporting, and official records for accommodations under Section 504 and the

Individuals with Disabilities Education Act (IDEA). LMS faculty and staff will receive professional development on an ongoing basis so that students who may qualify for special services are identified in a timely manner and so that instructional delivery and interpersonal relations are conducted appropriately and effectively. Compliance with applicable regulations will be guaranteed on a case-by-case basis.

LMS will also provide ESL services for students who speak English as a second language. This will be contracted out on an as needed basis.

Our special education teacher will be trained in the MACAR training program which is Montessori Applied to Children at Risk for Learning Differences.

### **Student Conduct, Discipline, Suspension, and Expulsion Procedures**

Montessori discipline emphasizes non-punitive, positive methods, which avoids personal humiliation, and takes age and maturity into consideration. LMS will communicate any infraction of the rules and expectations by students to their parents in a timely manner in order to maintain a cooperative effort to encourage children to become aware of the natural consequences of their actions. LMS will fully comply with S.C. Code Ann 59-63-235; expulsion of any student bringing a firearm to school. LMS will follow guidelines and regulations set forth by DSS.

**1. Expectations:** Respect for people and property; children are guided to develop age-appropriate behavior through grace and courtesy lessons, role-playing, modeling and discussions.

**2. Preventive Guidelines:** Positive expectations of behaviors are set up and reinforced.

**3. Procedure for discipline of negative behavior :** The child is told the expected behavior and how to correct the behavior. If the behavior continues, the child is removed and redirected to positive work. If behavior continues, the student's file is annotated, parents are notified, and a

conference is scheduled between the Teacher and parents/guardians to develop a plan. If the above has not worked and cooperation with the child and/or parents is not evident, a child may be expelled. Expulsion cannot be an alternative if parents have not been fully informed of the intervention strategies tried.

**4. Discipline Policy for Abusive, Destructive, and Obscene Language and/or Behavior:** The use of abusive language and/or behavior will not be tolerated. The student will be advised at the first occurrence and parents will be notified. For those instances in which a student's behavior poses a continuing disruption to the class or where the health or safety of the students is impacted, LMS reserves the right to suspend a student's enrollment until the student receives a psychological evaluation. A written note will be inserted in the student's file. Recommendations for further evaluation will be discussed; in cases of behavioral issues, modifications may be required to ensure continued enrollment. The primary criteria for re-admittance is the parental support of the school policy and professional recommendations and the student's own ability to modify behaviors. LMS reserves the right to terminate enrollment for the protection of students, administrators, teachers, volunteers and all other school personnel. In compliance with the Family Education Rights and Privacy Act (20 U.S.C.1232) the above policies will be given to parents and students at the beginning of the school year and they will sign a statement of notification and compliance. Disabled students will be addressed in accordance with state and federal law. Under IDEA of 2004, the continued provision of FAPE will remain with the LEA. A student must appeal an expulsion in writing to the LMS Director and Board; a decision will be made within five (5) business days. Alternative educational instruction will be used during expulsion and until the final decision.

Parental grievance may begin with the involved parties (teacher, administrator, etc.) within ten days following the event or the gained knowledge of the event. The parent shall have the right to present the grievance in writing to the Director within three days of the discussion or within ten days following the event. The parent may request in writing to meet with the Board of Directors via the Director within five days of the Director's response to the grievance. The Director will present the grievance, all correspondences and responses to the Board; a decision will be made within ten working days. Employees of the school may include a request for a hearing before the Director. Failure of the parent to attend the hearing shall end the grievance procedure.

### **Governance and Operation**

**Non-Profit Corporation Status:** LMS is organized as a non-profit corporation which has filed for incorporation under the South Carolina Nonprofit Corporation Act of 1994, Chapter 31, Title 33, S.C. Code (the “*Nonprofit Act*”). A copy of the LMS Articles of Incorporation (See Appendix J) which has been filed, Articles of Amendment, and Bylaws are presented in Appendix I. The Bylaws were approved and adopted by a majority of the LMS Planning Committee on /about April 30, 2013.

**Model of Governance:** A board of directors with a structure of officers, by-laws, and delegation of management to a head of school.

**Governing Board:** During the planning stage, the applicants convened a charter school committee, consisting of teachers, parents, and community members with various background experiences from different constituent districts to govern the charter school through the application process. The LMS Planning Committee will act as governing board until such time as

a duly elected Board of Directors is chosen. The LMS Board of Directors will be an odd number consisting of between seven and fifteen members.

**Board Development Committee:** No later than April of 2014, a Board Development Committee will be appointed by the LMS Planning Committee. Responsibilities of the Board Development Committee shall include: developing board director criteria;. recruiting potential board directors; preparing a slate of board director candidates in accordance with the bylaws; providing orientation of potential and new board directors, and training and continuing education for all board directors; and writing a board director job description. Board training will occur annually. This process will help to assure that there is a long-range plan for board leadership recruitment and development. Between its appointment and July 2014, the Board Development Committee shall begin to implement the responsibilities detailed above and shall recruit candidates for the Board of Directors. In July 2014, the Board Development Committee shall present the slate of candidates, who have indicated their willingness to serve, to the Charter Planning Committee for approval. The Board Development Committee shall provide orientation and training to all candidates prior to the election. The election shall be held within the first four weeks of the first day of school. All employees of the charter school and all parents or guardians of students enrolled in the school are eligible to participate in the election. Names of the candidates nominated by the Board Development Committee to serve on the school's governing board will be placed on a form to be sent home with every student in the school and given to every school employee. Employees will be given one vote. Parents or guardians of a student shall have one vote for each student enrolled in the school (Section 59-40-50 of the Charter School Act of 1996). The deadline for voting will clearly be stated on the ballot form. Ballots must be returned

by the deadline. Ballots will be counted and those elected to the board will be notified within five (5) business days.

**Transition from Planning Committee to First Elected Board:** At the first Board meeting after elections, members of both the Charter Planning Committee and the newly elected Board will be present, and authority will be transferred to the newly elected Board. At the first board meeting of newly elected directors, the Board of Directors will elect officers. The Board Development Committee will provide continuing training and education throughout the year of service.

**Board Terms and Subsequent Elections:** All Board Members will serve two (2) year terms, except that board members holding odd-numbered seats the first year of the opening of the school shall serve for only a one-year term. Odd-numbered seats will be elected in odd-numbered years and even-numbered seats shall be elected in even-numbered years. This process will allow for staggered terms and provide for consistency and continuity on the board. The process for all subsequent elections to the Board shall follow the same procedure as the first election, except that: At the *January meeting of the Board*, a Board Development Committee shall be appointed by the *Board Chairperson* in accordance with the LMS Bylaws, and that at the *July meeting*, the slate of nominees will be presented to the *Board* for approval.

**Responsibilities of Board of Directors:** The Board of Directors for LMS will govern in accordance with the Charter School Act of 1996. The Board's focus is to develop broad policies to further the mission of the school, to ensure compliance with the Charter, and to provide sound fiscal management. In addition to selecting, employing and evaluating the performance of the School Director, the governing board assumes responsibilities which are listed in Section 3.2 of the LMS Bylaws, which are attached as Appendix I.

**Employment of School Director:** The employment of the Director of the school will be a function of the LMS Board of Directors. The board may seek the advice and counsel of interested individuals or of an advisory committee, and it may hire consultants to assist in selection. However, final selection rests with the board. The Director will be employed by and will work at the discretion of the board subject to the rules and regulations of the state of South Carolina. Prior to the first year of implementation, the LMS Planning Committee will select the Director.

**Administrative Structure:** (See Appendix K) The South Carolina Public Charter School District will be the sponsor of Lowcountry Montessori School. The LMS Board of Directors will select, employ and contract with the Director of the School (Director). The Director shall select and employ all school staff, who will report to the Director. All service providers, consultants, and vendors will be contracted by the LMS Board. The Director may be tasked to coordinate the contracts that directly affect day-to-day operations of the school at the discretion of the governing board. The School Director will report to the Board on all contract matters.

The Director's function is to plan for, control, coordinate, supervise and direct the school in accordance with the purposes, policies, plans, procedures and programs authorized by the board. The board will rely on the Director to provide professional administrative leadership and will delegate to the Director the authority for the management and execution of day-to-day school activities, including management of personnel and instructional leadership. The Director will serve as the liaison between the board and the school. The Director is responsible, within the guidelines established by board policy, for the direction and coordination of students and staff in their efforts to reach educational goals adopted by the board and those listed in this Charter. The



Director's specific responsibilities will also include, but not be limited to, employment and retention of quality staff; preparation of annual budget for board approval; oversight of learning assessment processes and maintenance of accurate and current student and personnel records.

The Director, within the limits of the law and board policy, is the administrative authority of the school and is responsible for a thorough knowledge of all laws, regulations and instructions governing the position.

**Evaluations:** The board shall develop a systematic means of annually evaluating the Director's effectiveness in implementing the objectives expressed in policies. The Director has the responsibility for evaluating the effectiveness of all other school personnel.

**Freedom of Information Act (FOIA):** The governing board and the staff of LMS will comply with all state and federal laws and regulations as amended, school policies, and professional ethics, including the Freedom of Information Act and will design its policies regarding student records, administrative records, and meetings in accordance with S.C. Code Title 30 Chapter 4. LMS will comply fully with Title 30, Chapter 4 of the South Carolina Freedom of Information Act (FOIA). All Board of Director meetings will be conducted in public according to the stipulations of the FOIA, except for matters prescribed in Section 3-40-70.

**Board Meetings:** Board of Directors meetings will be held at least six (6) times per year and conducted by the Board of Directors in accordance with all provisions of the current law and any amendments as they may be enacted. The Board may designate Standing Committees as described in Section 6.3 of the LMS Bylaws.

**Statements of Liability and Indemnification:** As stated in the Bylaws, the Corporation shall,

to the maximum extent permitted by the Nonprofit Act, indemnify each of its Directors, officers and agents against expenses, judgments, fines, settlements and other amounts actually and reasonably incurred in connection with any proceeding arising by reason of the fact that any such person is or was an agent of the Corporation. The Corporation shall assume liability for the activities of the School and agree to hold harmless the sponsoring school district, its servants, agents, and employees from any and all liability, damage, expense, causes of action, suits, claims, or judgments arising from injury to persons or property or otherwise that arises out of the act, failure to act, or negligence of the school, its agents and employees, in connection with or arising out of the activity of the School.

### **Parent and Community Involvement**

One of the founding principles of the Montessori curriculum is the celebration of diversity. In order to create this diversity within Lowcountry Montessori, the Director, Board and staff will continue community outreach throughout the county and surrounding areas. This will include, but not be limited to, parent and community education, community events and advertising throughout the school year.

Parent and community member involvement will be continually sought out and encouraged in a number of ways. Parents and community members will be asked to serve on the Lowcountry Montessori School Board of Directors and will be active in the annual election of board members. LMS Board of Directors is ultimately responsible for all decisions and activities of the school, however, the Board Members will consult often with the educators at LMS and the parents of the students for input in all major decisions which will impact LMS. Also, LMS will

take steps to keep parents, community members, and LMS employees well informed about LMS's progress.

LMS maintains that informed parents will be involved parents. Experienced Lowcountry Montessori families will serve as mentors to families that are new to the Montessori program. LMS will use parent workshops and other family-oriented activities to involve parents in the school in order to ensure parents understand Montessori methods and the most important principles taught by a Montessori education. It is LMS's belief that the more parents understand the Montessori philosophy and teaching methods, the more enthusiastic and involved they will want to be with school functions and promoting the school as a much needed institution of learning. Additionally, parents will be encouraged to visit the school and sit in on classes to see the Montessori method in action and to see how their children are being impacted. LMS will provide parents many opportunities to volunteer their time and talent; such as serving on committees, helping with class projects, attending field trips, participating in school activities, and attending organized school functions which will foster family involvement and enrich the lives of LMS students and help further outreach into the community.

LMS has established community partnerships with CBC Bank as well as Moss, Kuhn & Fleming, P.A. The Board of Directors will continue to seek out partnerships within the community in order to develop relationships between the school, students, staff, parents and businesses. LMS plans to seek out and develop relationships with various service organizations in the community such as Beaufort's three Rotary Clubs.

## **Budget and Finance**

**Annual Budget:** The Board of Directors will determine the business and financial services protocol for Lowcountry Montessori School. The Charter Committee is exploring alternatives for our financial management and will ultimately select the process that best suites our fiscal needs as well as establishes us as sound stewards of public funds. Our spread-sheet formatted, LMS Five-Year Budget is presented in Appendix M, and our Ten-Year Budget is presented in Appendix N. This budget has been prepared in accordance with State Department of Education (SDE) Financial Accounting Handbook, with reference to the Funding Manual and the Single Audit Guide. The Board of Directors will adopt an Annual Operating Budget during June preceding the start of the Fiscal Year and will receive and approve Monthly Financial Statements during the operational Fiscal Year.

### **Revenues:**

1. Revenue account codes used in the attached budget are in accordance with the SDE Financial Accounting Handbook for South Carolina school districts.
2. LMS revenues do include grant revenue; specifically, the Charter School Program (CSP Grant, Implementation Phase for both year 1 and year 2.

### **Expenditures:**

- i. Expenditure account codes used in the attached budget are in accordance with the SDE Financial Accounting Handbook for South Carolina school districts.
- ii. Anticipated expenditures follow the same budget codes (Fund, Function, Object) that are required of school districts operating in South Carolina. Costs associated with planning, implementation, and continued operation are included.

### 3. Budget and Accounting Management:

The Board of Directors will be responsible for the fiscal management of the CMCS. As stated above, the Planning Committee is researching fiscal management options. We are currently being assisted by Bill Moser.

**Annual Audit:** Our annual audit is a statutory requirement; accordingly, we will comply with all aspects of this mandate. We will solicit three bids from independent Certified Public Accountant (CPA) firms and we will select the firm that (a) has prior charter school auditing experience and (b) best meets our needs. The audit will engage our financial and administrative operations and will – in compliance with law – be conducted in the same manner as all schools in our school district.

LMS will adhere to accounting, reporting, and auditing procedures and requirements of our sponsor, which are those for all public schools operating in South Carolina by:

- Establishing policies and executing the corresponding internal fiscal control procedure to properly account for all revenue and expenses as directed in the Financial Accounting Handbook and Funding Manual.
- Maintaining appropriate records on a by-transaction basis thereby establishing our financial management system as “audit ready” at the conclusion of any given transaction.
- Making required reports (on-call, monthly, quarterly, annually) to appropriate agents and agencies.
- Ensuring that all accounting, reporting, and auditing procedures and requirements will comply with the published specifications of the Office of District Auditing and Field Services contained in the (a) Single Audit Guide, (b) Financial Accounting Handbook, and (c) Funding Manual.

- The Board of Directors will receive, review, and approve the Auditor’s Report prior to official reporting.

**Pupil Accounting System:** In accordance with the guidelines set forth by the South Carolina Pupil Accounting Manual and the South Carolina Student Accountability Manual, we will adhere to the reporting procedures, policies, and regulations that apply to all public schools in South Carolina. Reports will be maintained and filed according to district, state, and federal requirements (See Appendix L).

**Negotiated Services Documentation:** Currently we have not negotiated any services with the local school district, our sponsor, or any other outside vendor. The Charter Committee is currently researching options (in-house, out-sourcing) for fiscal services, food services, custodial services, maintenance, curriculum, library and media services, pupil transportation services, and the like. LMS will thoroughly review all options and proceed with the protocol that best meets our financial needs and best sets us as sound guardians of public funds.

## EMPLOYEES

### 1. Employment Process

In advertising for a position, LMS will post the position in places that will provide a good pool of candidates (such as [www.cerra.org](http://www.cerra.org), Career Builder, state newspaper, national magazines, websites for charter schools or schools in general, the Public Charter School Alliance of South Carolina, etc.). LMS will also communicate with Montessori Teacher Certification program liaisons, as well as American Montessori Society and Association Montessori Internationale, the two central voices of Montessori education. Immediately upon SCSPD approval of the Charter,

Lowcountry Montessori School planning committee will begin advertising for a school director. Each applicant will be screened by members of the Planning Committee to identify qualified individuals. Members of the Planning Committee will personally interview the most qualified applicants for the Director's position, and the Planning Committee will hire the Director. The LMS planning committee choose a smaller committee to conduct the director search. In subsequent years, the LMS Board of Directors will be responsible for hiring a Director when said position is available.

The Director will be responsible for hiring faculty and staff. Selected candidates will be interviewed personally; if possible, analyzing teacher portfolios and observing teacher classroom demonstrations will also be part of the selection process. Extensive background reviews will be conducted on all interviewed applicants to verify past experiences and ensure the safety of our children. All employees and others serving in an official capacity may be subject to fingerprinting, SLED and FBI background checks.

The desire of LMS is to hire the most qualified Director possible; however, in the event that this cannot be accomplished within a reasonable time frame, LMS planning committee will begin advertising, interviewing and hiring staff and faculty.

LMS teachers will be certified as required by South Carolina Statutes and will meet the highly qualified guidelines established by the No Child Left Behind Legislation or as amended by federal or state law. We may employ skilled, selected non-certified personnel to provide institutional services or to assist instructional staff members as instructional assistants in compliance with the laws of the State of South Carolina. We will not employ an individual to provide instructional services if the individual's certificate or licensure as an educator is

suspended or revoked by this or any other state, as per South Carolina Statute. We reserve the right to mandate whatever testing of employees is deemed necessary to protect the students. We will not violate the anti-discrimination provisions of The South Carolina Education Equity Act.

## **2. Teacher Evaluations**

LMS will comply fully with ADEPT, which is South Carolina's system for assisting, developing, and evaluating professional teaching. Based on state expectations (i.e., the ADEPT Performance Standards) that are aligned with nationally recognized professional standards, the ADEPT system forms a seamless continuum for educators throughout the entirety of their careers. Additionally, LMS will utilize the Montessori Guidance Document created by the ADEPT program administrators for Montessori programs.

The School Director and educational support staff will conduct frequent informal teacher observations to identify strengths and professional growth targets. Additionally, the Director will formally observe teachers in the classroom between one and four times a year, depending on the teacher's level of experience. Informal collegial dialogue about systemic improvement of student work will be ongoing throughout the year. The Director will be responsible for directing performance improvement for or taking disciplinary action against LMS employees.

## **3. Terms and Conditions of Employment**

The timeline, process, and forms utilized will be shared with staff at the beginning of the school year and through staff development and/or trainings. Teachers will maintain daily and weekly lesson plans that will be monitored by the administration and reviewed during teacher conferences. The Planning Committee shall develop a staff/employee handbook containing employee/staff policies and procedures. The handbook will be distributed annually, at the



beginning of each school year, with each employee signing an affidavit of receipt. The LMS Board of Directors will review the handbook annually and update as needed. Policies and procedures within handbook will adhere to all state and federal laws governing educational organizations.

#### **4. Grievance and Termination Procedures**

##### ***A. Teacher Employment and Dismissal Procedures***

1) LMS will not adopt the procedures for the employment and dismissal of teachers outlined in S.C. Code Ann. § 59-25-410 *et seq.* (1990).

2) LMS will maintain a high standard of excellence and a formidable code of ethics to ensure the safety and well-being of the students. We expressly reserve the right to discharge employees after exhausting an internal due process hearing. Violation of the following infractions will result in immediate disciplinary action ranging from verbal warning to termination. Infractions shall include, but not be limited to, the following:

absenteeism and tardiness; poor performance; insubordination; violation and/or lack of enforcement of school rules; breach of confidentiality; theft; harassment; misconduct with students; cheating; failure to keep valid teaching license; misuse of property; fraud, dishonesty, and/or false statements; threats and/or weapons in the workplace; and substance abuse.

There may be other circumstances in which an employee of LMS may be disciplined and/or terminated. LMS retains the discretion at all times to immediately terminate an employee or to decide what level or type of discipline is warranted, if any. Employees of LMS are *at-will*

employees of Lowcountry Montessori School and can be terminated at any time without prior disciplinary action.

Lowcountry Montessori School shall not be required to use any of the following steps of discipline or use them in any particular order, but retains the discretion at all times to determine the nature and severity of discipline and/or termination. In the event it becomes necessary to discipline an employee, the following steps of discipline may occur at the discretion of LMS: verbal warning; written warning; final warning; probation; and/or termination.

The employee's right to a hearing before the Board of Directors is described in the next section, as the Board has the authority to hear employee grievances.

***B. Grievance Procedure for School Employees***

1. Lowcountry Montessori School ("the School") does not follow the statutory provisions of Article 5, Chapter 25 of Title 59 of the South Carolina Code of Laws, (1976 as amended), concerning the Employment and Dismissal of Teachers.
2. All employees of the School are considered employees *at will*, as defined by the laws of the state of South Carolina.
3. In the event that an employee is dissatisfied with the Director's resolution of an issue, including but not limited to termination of employment, then the employee may file a written appeal with the Board of Directors after first notifying the Director in writing of his/her intent to appeal. The Board may decline to hear an appeal. Any decision of the Board regarding an appeal shall be final.
4. No person associated with a grievance shall be the object of administrative reprisal, sanction, or penalty of any kind for either activating or participating in the grievance

procedure.

5. The procedure prescribed herein shall be adhered to in processing employee complaints under Title I of the Education Amendment of 1972 (Sex Discrimination).

6. This process shall only be followed for employees of LMS and does not apply to contracted services provided by others.

### **Insurance**

**Workers' Compensation Insurance:** The South Carolina Workers' Compensation Law is designed to provide medical care to bring about the earliest possible recovery from the injury, a percentage of wages and salary lost during the injured employee's disability, and, in case of death, compensation for the deceased employee's dependents. The Charter Committee has obtained an estimated annual premium from a South Carolina licensed insurance company in the appropriate amounts. See Appendix for cost estimate and insurability.

**Liability Insurance:** The Charter Committee has obtained an estimated annual premium for liability insurance from a South Carolina licensed insurance company. These policies are designed to match or exceed the minimum limits required by the South Carolina Tort claims Act S.C. Code Ann. § 15- 78-120 (Supp. 2011). See Appendix for cost and insurability.

**Property Insurance:** The Charter Committee has obtained an estimated annual premium for property insurance from a South Carolina licensed insurance company. Sufficient insurance will be provided to cover loss to the school building and contents for fire and theft. See Appendix for cost estimate and insurability.

*iv. Indemnity Insurance*

The Charter Committee has obtained an estimated annual premium for indemnity insurance from a South Carolina licensed insurance company. We will provide indemnity insurance against civil and criminal liability for the charter school to protect or sponsor, the members of the board of our sponsor, and the employees of our sponsor acting in their official capacity with respect to all activities related to the charter school. See Appendix for cost estimate and insurability.

*v. Automobile Insurance*

The Charter Committee has obtained an estimated annual premium for automobile insurance from a South Carolina licensed insurance company. We will purchase automobile insurance, both property and liability insurance, to cover the cost of vehicles and transportation for charter school students. See Appendix for estimated cost and insurability.

*vi. Other Insurance*

The Charter Committee has obtained an estimated annual premium for umbrella insurance from a South Carolina licensed insurance company. See Appendix for cost estimate and insurability.

**Indemnification:** Lowcountry Montessori School assumes the liability for the activities of the charter school and agrees to hold harmless the school district, its servants, agents, and employees from any and all liability, damage, expense, causes of actions, suits, claims, or judgments arising from injury to persons or property or otherwise that arises out of the act, failure to act, or negligence of the charter school, its agents and employees, in connection with or arising out of the activity of the charter school.

### **Transportation**

LMS will not provide transportation to students.

### **Facilities and Equipment**

**Facility Not Identified:** LMS has formed a Facilities Committee to research and identify facilities in the community which can serve as a temporary location, which will be renovated to meet current building codes and any regulations required for a public charter school, until a permanent facility can be built and or remodeled to accommodate the needs of a Montessori school. As LMS aims to be a community school, the first priority of the Facilities Committee is to identify a geographic location in Beaufort County that is racially and socioeconomically diverse. We have identified a few geographic areas that will best serve a diverse population.

### **FMS Timeline for Permanent Facility**

1. Once Charter approval received – locate temporary facility to be used for two years
2. Consult with Ben Thompson on any needed renovations to temporary facility
3. Complete renovations to temporary facility by July 2014
4. Locate land to build or permanent location to renovate
5. Complete renovations or building within two year time frame. Facility must be ready to move into no later than July 2016. This allows adequate time to complete and secure funding and construct the building by the beginning of the third year of operation.

**A Montessori-Inspired Facility:** Indoor and outdoor spaces will honor Montessori principles.

The Montessori Foundation and other Montessori organizations offer many excellent ideas for creating a space that truly supports a Montessori education. Once the Facilities Committee has ensured that all of the state regulations have been met, it will turn its attention to the design of the space that will allow it to meet Montessori standards as well.

### **Conclusion**

Wall Street Journal writer Peter Sims writes, “Ironically the Montessori Educational approach might be the surest way of joining the creative elite which are so over-represented by the schools alumni that one might suspect a Montessori Mafia: Google’s founders, Larry Page, Sergi Brin, Amazon’s Jeff Bezos, Video Game Pioneer Will Wright, Wikipedia founder Jimmy Whales, not to mention Julia Childs, and Rapper P. Diddy Combs.” He continues, “Is there something going on here? Is there something about the Montessori approach that nurtures creativity and inventiveness that we can all learn from?” We think so.