



Office of Charter Schools

REQUEST FOR PROPOSAL

For

MONTESSORI ACADEMY PREPARATORY SCHOOL

Opening in the 2020-21 School Year

PROPOSAL COVER SHEET & ENROLLMENT PROJECTION

Primary Contact. Identify the **primary point of contact** for your team. This individual will serve as the contact for all communications, scheduling, and notices regarding your application. The Primary Contact should be the user of the team's CSAPPHIRE account to ensure that your team receives all general communications promptly.

Note: As with all aspects of your application, names and contact information of the Primary Contact will become public information.

Primary contact person: Vivian Cain

Mailing address: 7507 N. Michigan Road
Street/ PO Box

City: Indianapolis **Zip Code:** 46268

Primary Phone: 317-627-5555

E-Mail Address: hello@inmontessori.com

Primary contact for facilities planning: Same as Primary

Phone Number: Same as Primary **e-mail:** Same as Primary

Name of team or entity applying: The Montessori Educational Charity

Names, roles, and current employment of all persons on applicant team (*you may add lines as needed*):

Full Name	Current Job Title and Employer	Position with Proposed School
Vivian Cain	Director; Maria Montessori International Academies	Board Chair; President
Jonathan Kroenke	Staff Accountant; Availay, LLC	Board Treasurer
Joy Reese	State-Certified Educator; Montessori Educator; OES Integrator	Board Secretary
James Miletello	Nonprofit Consultant; Self-Employed.	Fundraising; Development

***Does this applicant team have charter school applications under consideration by any other authorizer(s) in the United States?** ☐ Yes ☒ No

Will an application for the same charter school be submitted to another authorizer in the near future?

☐ Yes ☒ No

Provide the intended opening year for the proposed school.

Opening Year	*Geographic Community	Opening Grades	Grade Levels at Full Enrollment
2020	<ul style="list-style-type: none"> Campus 1: 7507 Michigan Road, Indianapolis IN, 46268 Campus 2: 4370 Weston Pointe Drive, Zionsville/ Carmel IN 46077 	K-5	216

Model or Focus of Proposed School (e.g., Arts, College Prep, Dual-Language, etc.), if any:

Montessori

***Does the school expect to contract or partner with an Education Service Provider (ESP; i.e. Charter Management Organization or Education Management Organization) or other organization for school management/operation?**

☐ Yes ☒ No

Proposed Principal/Head of School Information: Unknown; Will be identified via a process led by Chair and President/CEO Vivian Cain.

School Enrollment Projection

Academic Year	Planned Number of Students	Maximum Number of Students	Grade Levels Served
Year 1:	216	216	K-5
Year 2	216	216	K-5
Year 3	216	216	K-5
Year 4	216	216	K-5
Year 5	216	216	K-5

SCHOOL NARRATIVE

SCHOOL OVERVIEW

MISSION

The Montessori Educational Charity (MEC) is a 501(c)(3) non-profit organization with a mission *to advance the growth of the Montessori movement within Indiana*. This mission has moved the MEC's leadership to submit this proposal in support of The Montessori Academy Preparatory School (MAPS) to serve Indianapolis and Zionsville/Carmel families. MAPS' mission, in turn is *to provide community families with a high-quality, tuition free Montessori education*. MAPS will be run and operated by the MEC and will subsequently be responsible for meeting the conditions of the MAPS charter.

The MEC was one of the first institutions in the area to offer an authentic Montessori education. Since its founding, it has operated Maria Montessori International Academies (a network of three private Pre-K schools) serving Carmel, Zionsville, and Indianapolis families with great success. The MEC's work highly reflects the well-publicized impact of a Montessori education

For example, a 2016 study notes that a Montessori education facilitates improved outcomes in reading, mathematics, cognitive skills, social skills, writing, creativity, and interpersonal communication. The MEC's work and experience reflects such findings, as the organization has successfully taught 100% of its four-year-olds to read before the age of five. In fact, these students can read full sentences, paragraphs, and age-appropriate books at levels comparable to five- and six-year-olds in other schools. These children represent a variety of racial, ethnic, income, and other socioeconomic groups. Thus, a Montessori education successfully mitigates the challenges to literacy in many communities.

The MEC's Pre-K students also demonstrate high understanding of each of the four core mathematics operations before turning five – oftentimes much earlier than their comparably-aged peers. They can add/subtract at least single digits, and most can demonstrate and express principles of multiplication and division. Possessing such skills subsequently contributes to increased confidence in mastering higher mathematics concepts upon enrollment in kindergarten and beyond. Like literacy, Montessori efficacy in this respect is also demonstrated irrespective of a child's socioeconomic status.

The MEC's Pre-K success to date has motivated its leadership to take steps to bring Montessori elementary opportunities to marginalized, underserved students. This includes opening MAPS as tuition-free charter school through which all families (irrespective of socioeconomic status) have an equal opportunity to experience the benefits of Montessori education.

Vision

The MEC's vision for MAPS is to create a school community which positions student for lifelong success via the application of the Montessori model. MAPS will be a two-campus school, with both campuses located less than five minutes from one another:

- Campus 1: 7507 Michigan Road, Indianapolis IN, 46268.
- Campus 2: 4370 Weston Pointe Drive, Zionsville/ Carmel IN 46077.

A total enrollment of 216 will be split between both campuses, with each campus serving 108 students in Grades K-5. Students at both campuses will be very familiar with each other given weekly intercampus trips and overall efforts to build a multi-campus school culture.

EDUCATIONAL NEED AND ANTICIPATED STUDENT POPULATION

MAPS will serve 216 students in grades K-5. 108 of these students will live within four miles of Campus 1 (7507 Michigan Road, Indianapolis IN, 46268), and 108 of these students will live within four miles of Campus 2 (4370 Weston Pointe Drive, Zionsville/ Carmel IN 46077). The MEC selected these two locations given that: (1) The MEC operates existing Pre-K programs at both Campuses; (2) There is room to launch MAPS at both Campuses pending some facility renovations; and (3) Community parents have expressed a desire for public Montessori schools in both communities.

MAPS will select its students via a random lottery process, so there will be no selective enrollment practices in place at the schools. All students will reflect prevailing community demographics, so there will be a mix of students who have learning needs at all levels. MAPS will have the capacity to meet the needs of all students.

EDUCATION PLAN/SCHOOL DESIGN

MAPS will provide an education based on the philosophy and methods developed by Dr. Maria Montessori in the early 1900s. While a Montessori education fully encompasses a "traditional curriculum," it actually goes beyond that to teach students to think clearly, conduct their own research, express themselves in writing and speech, and practically apply their knowledge. Dr. Montessori developed her method of education to serve disadvantaged children in Rome, Italy. Since then, her educational philosophy has established itself in diverse communities worldwide because of its central distinguishing tenet: Child-driven education.

Montessori philosophy is also based on the principle that all children carry within themselves the person they can become. In order to maximize their physical and intellectual potential, students must develop independence and self-discipline. Dr. Montessori developed the notion of the "scientifically prepared environment" which encourages children to learn according to their own capacity and learning styles.

Finally, a Montessori education is based on the idea of non-competitive, cooperative activities that help children develop a strong self-image, high levels of academic and social competence, and the confidence to face challenges. Encouraged to make decisions at an early age, Montessori-educated children are problem-solvers who can make appropriate choices, manage their time, and work well with others.

Planes of Development

A key to the Model is the notion of Planes of Development (POD). According to Dr. Montessori, each POD occur in six-year intervals - each of which is divided into three-year sub-planes. PODs and sub-planes have distinct sensitive periods where children can master a particular skill because they experience an inner impulse to learn. The table below summarizes the POD model:

Montessori Planes of Development

Planes	Ages	Key Focus	Sub-Planes/Ages
Plane 1	0 – 6	Absorbent Mind	<ul style="list-style-type: none"> • Parent/Infant /Community (3 months – 3 years) • Preschool (3-6 years)
Plane 2	6-12	Age of Reason	<ul style="list-style-type: none"> • Lower Elementary (6-9 years) • Upper Elementary (9-12 years)
Plane 3	12-18	Validation & Socialization	<ul style="list-style-type: none"> • Junior High (12-14 years) • High School (14-18 years)
Plane 4	18-24	Maturity	<ul style="list-style-type: none"> • Finding spiritual strength and independence.

MAPS classes will be based on three-year sub-plane age groupings (Planes 1 and 2 above) instead of a traditional grade-level structure in order to capitalize upon POD sensitive periods. This class structure (which reflects Montessori practices) will provide MAPS with the ability to balance the demands of differentiated instruction, small group lessons, and unstructured time. Students can freely progress at their own pace in a socially-supportive and non-competitive atmosphere. This multi-age learning environment will also provide younger students with the opportunity to observe, imitate, and internalize skills learned from older students. Conversely, older students will also have significant opportunities to exercise leadership and nurturing skills with younger students.

CURRICULUM

MAPS' curriculum will be organized as an inclined spiral plane of integrated studies rather than compartmentalized separate subjects with given topics considered only once at a given grade level. Separate academic disciplines will be tied together into studies of the physical universe, the world of nature, and the human experience. In addition to being fully-mapped to Indiana State Learning Standards, the MAPS curriculum will also be infused with arts, music, physical education, foreign language instruction, and expeditionary learning.

AFTER-SCHOOL ACTIVITIES

MAPS will plan after-school activities such as the following:

- *Homework Center.* MAPS will have a homework center to provide an after-school homework support center for students who are not completing homework independently.
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- *Reading Center.* MAPS will provide additional literacy instruction after school to specifically build the necessary literacy skills with these students.
- *Teacher Tutoring Hours.* Every MAPS teacher will spend one hour per week tutoring students, either one-on-one or in small groups. It is at the teacher's discretion which student(s) they tutor and for how long.

The MAPS budget has a small amount of funds allocated for after-school programming. However, the MEC will engage in specific fundraising to help implement additional after-school programming at MAPS.

COMMUNITY ENGAGEMENT

The MEC has conducted the following community engagement activities in support of MAPS:

- A community forum at the Indianapolis Public Library (6201 Michigan Road, Indianapolis, IN 46268) on January 25, 2019. This event was attended by four parents, with ten parents sending email inquiries. Please see **Attachment 8** for a copy of the flyer promoting the event.
- A community forum scheduled for January 30 (but was cancelled due to inclement weather) at the Hussey-Mayfield Memorial Library in Zionsville. This event will be rescheduled for some time during the week of February 11, 2019. Please see **Attachment 8** for a copy of the flyer promoting the original event.
- 10 social media posts which promoted MAPS and engaged parents.
- An online petition supporting the school signed by 126 community residents. This petition received 2-5 signature each day and will remain open until the conclusion of this MAPS charter school approval process. It can be viewed online at this link:

<https://bit.ly/2G2iWvE>. Please see **Attachment 8** for the signed petition with the current 126 signatures.

The MEC's approach to community engagement is based on a model that leverages the unique benefits of a Montessori education. That model includes elements such as education and outreach, parent engagement, and participation in regional advocacy efforts— each of which will provide The MEC with an opportunity to influence area education practices.

To this end, the MEC is establishing relationships with additional public libraries as a means to further engage the community through a series of workshops named Preparing Our Children (POC). Through these relationships, staff will conduct 4 POC workshops (1 per quarter) which examine topics related to highly-quality early childhood education (in general) as well as topics which are Montessori- specific. POC workshops will position attendees (both parents and providers) to provide community children with high quality early childhood experiences— Montessori or otherwise.

Parent engagement is also a crucial aspect of The MEC's POC work. For example, POC workshops examine topics such as an overview of Montessori education, how to identify a quality Pre-K program, literacy for Pre-K children, Montessori-inspired parenting and teaching tips, etc. Such workshops leverage The MEC's experiences in providing similar events to its parents throughout the course of the school year at its Indianapolis and Zionsville Pre-K school campuses. This information positions parents to better understand their role and potential in facilitating the academic success of their young children.

LEADERSHIP AND GOVERNANCE

Full Name	Current Job Title and Employer	Position with Proposed School
Vivian Cain	Director; Maria Montessori International Academies	Board Chair; Board Secretary
Jonathan Kroenke	Staff Accountant; Availay, LLC	Board Treasurer
Joy Reese	State-Certified Educator; Montessori Educator; OES Integrator	Board Member

AGE/GRADE OF STUDENTS

The table below provided an aggregate view of MAPS' enrollment across both of its Campuses:

Grades	Number of Students					
	Year 1	Year 2	Year 3	Year 4	Year 5	At Capacity
K	36	36	36	36	36	36
1	36	36	36	36	36	36
2	36	36	36	36	36	36
3	36	36	36	36	36	36
4	36	36	36	36	36	36
5	36	36	36	36	36	36
	216	216	216	216	216	216

The tables below provided an aggregate view of MAPS' enrollment across both of its Campuses:

Grades	Campus 1 (Indianapolis) Number of Students					
	Year 1	Year 2	Year 3	Year 4	Year 5	At Capacity
K	18	18	18	18	18	18
1	18	18	18	18	18	36
2	18	18	18	18	18	18
3	18	18	18	18	18	18
4	18	18	18	18	18	18
5	18	18	18	18	18	18
	108	108	108	108	108	108

Grades	Campus 2 (Zionsville/Carmel) Number of Students					
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	Year 1	Year 2	Year 3	Year 4	Year 5	At Capacity
K	18	18	18	18	18	18
1	18	18	18	18	18	36
2	18	18	18	18	18	18
3	18	18	18	18	18	18
4	18	18	18	18	18	18
5	18	18	18	18	18	18
	108	108	108	108	108	108

Finally, the table below demonstrates the class structure at MAPS in terms of the mixed age grade model which drives the Montessori method:

MAPS Classroom Structure		
Classroom Grades	Campus 1 Classroom	Campus 2 Classroom
Kindergarten	18	18
1-3	27	27
1-3	27	27
4-5	36	36
<i>Subtotal</i>	<i>108</i>	<i>108</i>
Total	216	

CURRICULUM AND INSTRUCTIONAL METHODS

PROGRAM OVERVIEW

MAPS commits to preparing students to be constructive contributors in our community by focusing on academic, personal and social development. Therefore, the learning environment of MAPS is based on the Montessori philosophy because of its emphasis on the development of the whole child. It recognizes that children have a desire to learn and, given the proper environment, they can develop intellectually, socially, emotionally and physically. This “prepared environment,” as Dr. Montessori called it, includes not only the classroom and materials, but the social setting or atmosphere.

The Montessori philosophy, initially developed for underprivileged children, by provides a child-centered, individualized approach to teaching and learning. Research focusing on children of low socio-economic status shows that Montessori education has resulted in high levels of academic and personal achievement. The educational tenets of the Montessori philosophy that support MAPS’s mission and distinguish this school are:

- **Individualized, Differentiated Learning** - Montessori education is built upon the tenet that all learners are individuals - in style, pace, and interests. MAPS’ individualized curriculum allows children to strive for their own personal best.
- **Mixed-age Groupings** - Students will be grouped into mixed-age classes that span three years. These mixed classrooms provide numerous benefits including a greater range of curriculum options and reduced competition. Older children teach younger children which builds confidence and competence. Peer tutoring also promotes cooperation and a sense of community.
- **Prepared Environment** - Montessori instruction progresses from concrete explorations and concept development to abstract understandings. Elementary classrooms will have an abundance of carefully sequenced Montessori materials to support this learning progression.
- **Parent Involvement** - Parents will be welcome at MAPS and will be given many opportunities for participating in and setting the direction of school life.
- **Teacher’s Role** – MAPS’ teachers will facilitate learning by carefully observing each child’s behavior and growth. They will then guide each child using changes in the environment, invitations for inquiry and direct instruction.
- **Character Education** - Personal and social education will be integrated into MAPS’ learning program. Classroom life will emphasize the Montessori values of grace, courtesy, respect and responsibility. Teachers will model these values and expect them from students throughout the school.

- **Integrated Teaching and Learning** – Montessori education emphasizes interdisciplinary teaching to encourage connections across the curriculum and to students' personal lives. Emphasis will be placed on projects that require open-ended research and in-depth study using primary and secondary sources as well as other materials.

CURRICULUM AND INSTRUCTIONAL DESIGN

Overview

Dr. Maria Montessori developed her method of education in the early 1900s to serve disadvantaged children in Rome, Italy. Since then, her educational philosophy has established itself in diverse communities worldwide because of its central distinguishing tenet: Child-driven education. Through a Montessori education process, the teacher prepares the environment, directs the activity, and offers the child stimulation. However, it is the child who learns and is motivated through learning itself.

A Montessori program is based on non-competitive and cooperative activities that help children develop a strong self-image, high levels of academic and social competence, and the confidence to face challenges. Encouraged to make decisions at an early age, Montessori-educated children are problem-solvers who can make appropriate choices, manage their time, and work well with others. They exchange ideas and discuss work freely. These positive communication skills build the foundation for negotiating new settings.

As noted herein, MAPS classes will be based on three-year age groupings instead of a traditional grade-level structure. This will provide the ability to balance the demands of differentiated instruction, small group lessons, and unstructured time. Students can freely progress at their own pace in a socially-supportive and non-competitive atmosphere. This multi-age learning environment will also provide younger students with the opportunity to observe, imitate, and internalize skills learned from older students. Older students will also have significant opportunities to exercise leadership with younger students.

Finally, MAPS' curriculum will integrate studies rather than compartmentalize them into separate subjects. Separate academic disciplines are together with overarching lessons given by teachers to the entire class. In addition to being fully-mapped to Indiana State and Common Core Learning Standards, MAPS' curriculum will be infused with arts, music, physical education, and foreign language instruction.

Basic Learning Environment

A Montessori education meets the needs of State and local guidelines while also positioning students to think and reason, communicate with confidence, perform research, and apply their knowledge within their communities. It does so by using a stage-based approach to facilitating education often referred to Planes of Development (POD). According to Dr. Montessori, there are four PODs (broken down into six-year intervals) - each of which is divided into three-year sub-planes. Collectively, PODs and sub-planes are said to feature a key focus area through which

children can pursue educational mastery. The table below summarizes these PODs and sub-planes:

Montessori Planes of Development

Plane 1	0 – 6	Absorbent Mind	Pre-K Parent/Infant /Community (3 months – 3 years) Pre-K Preschool (3-6 years)
Plane 2	6-12	Age of Reason	Pre-K Lower Elementary (6-9 years) Pre-K Upper Elementary (9-12 years)
Plane 3	12-18	Validation & Socialization	Pre-K Junior High (12-14 years) Pre-K High School (14-18 years)
Plane 4	18-24	Maturity	Finding spiritual strength and independence.

MAPS class structure will be based on the use of three-year sub-plane age groupings noted above rather than a formal K-5 grade-level structure in order to capitalize upon POD sensitive periods. This practice reflects Montessori guidelines and leads to many positive outcomes, including meeting the demands of differentiated instruction, facilitating small group lessons, and creating opportunities for unstructured time driven by student interest. This structure also positions students to freely progress at a pace reflective of their abilities within a socially-supportive and non-competitive atmosphere.

PLANNED CURRICULUM

In the MAPS' curriculum, separate academic disciplines will be tied together into studies of the physical universe, the world of nature, and the human experience. In addition to being fully-mapped to Indiana State and Common Core Learning Standards, MAPS' curriculum will also be infused with arts, music, physical education, foreign language instruction, and expeditionary learning.

Like all Montessori curricula, MAPS' curriculum will integrate subjects of study in unique and engaging ways. For example, the integration of science studies within overarching geography studies typifies the Montessori instructional method and provides useful context and rationale for studying topics such as weather, rocks, and migration. Montessori's Five Great Lessons are revisited and built upon throughout the grades, and provide overarching, "big picture" stories that inspire more specific study of subjects such as physics, botany, anthropology, world cultures, and ancient history.

In the Lower Elementary grades (K-3) Montessori curriculum provides an array of specially developed materials and methods. These allow young children to build concepts from concrete models and experiences through self-directed activity and peer and teacher interaction. These core materials become less evident in the Upper Elementary (4-5) as students begin to transition to symbolic and abstract conceptual understandings.

Finally, MAPS' curriculum will use a balanced literacy model which includes practices such as reading aloud to model fluent reading, shared reading with the whole class where students read along with the teacher and interact with the text through predictions and connections with their own life, guided reading in small groups to carefully select texts and lessons that small groups of students can interact with and benefit from, and independent reading.

Alignment Goals

MAPS' curriculum will overlay with the Indiana State Curriculum Frameworks, with a shared commitment to the development of core academic skills. It will do so through the use of specially developed materials and methods which integrates core subjects in novel and meaningful ways and draws increased attention to certain subjects and skills. This will be accomplished by effectively aligning, merging, and consolidating the Montessori Curriculum Standards, Indiana Curriculum Frameworks, and MAPS Learning Objectives. This curriculum, along with relevant assessment methods and tools, will be organized into a series of MAPS Curriculum & Assessment Handbooks for the Lower and Upper Elementary students. These Handbooks will provide a framework for teachers so they may approach their work with students and colleagues with consistency and shared language and expectations.

Alignment Process

MAPS's founding board has engaged in preliminary alignment processes to demonstrate to reviewers the direction it is pursuing with a MAPS charter. This process led to the conceptualization of sequence comprehensive lessons for several core curriculum subjects. This process affirms that Montessori lessons target many of the core learning objectives of the Indiana Curriculum Frameworks.

Upon approval of a MAPS charter, the predevelopment team will fully align and cross-reference the Montessori curriculum with the Indiana Curriculum Frameworks and Common Core. Development of these areas will be supported through focused professional development and collaborative study. This will lead to a series of academic, personal, and social achievement objectives which will drive MAPS' model as well as assessment practices.

Attachments 2-4 contain more information about this process.

Montessori-Specific Curricular Materials

MAPS' primary instructional materials will be traditional Montessori materials (bead chains, gold bead, noun box, grammar box, etc.). These materials are sensory based learning tools which enhance traditional learning. They use the process of hands-on experience to facilitate

learning. Each material facilitates control of error which help children engage in learning without the need for extended adult engagements. This leads to a self-correcting process which leads to an organized way of thinking for children. It also helps teach problem solving, content absorption, and preparation for further adult guidance.

Supplemental Reading Materials

Montessori materials are strong in four of the five areas of reading: Phonics, phonemic awareness, vocabulary, and fluency. Thus, MAPS recognizes that its traditional elementary Montessori literacy program will need to be supplemented with reading comprehension development opportunities. MAPS will do so by introducing **Project Read**- a supplement to the Montessori program which specifically targets the fifth area of literacy, reading comprehension.

Instructional Strategies

MAPS will use a combination of hands-on materials and lessons that integrate subject areas to actively engage students in their learning process. All lessons are given individually or to small groups of students at a developmentally and academically appropriate time. MAPS' instructional strategies also use the process of guiding, observing, teaching, re-teaching, and systematic record keeping which allow teachers to tailor the curriculum to each child. MAPS' curriculum will subsequently strengthen student's desire to learn by engaging their interest, offering information, stimulating the use of skills, communicating limits and expectations, and facilitating learning activities. This curriculum is also strengthened by the fact that MAPS will always have two educators (a teacher and an assistant) in each classroom to facilitate both individual and small group instruction.

Differentiated Instruction

As noted in **Special Populations**, remediation is built into MAPS' curriculum, as the Montessori classroom meets the needs of all students and learning styles. Students are instructed in small groups and will receive reinforced instruction on the same topic as many times as needed to show mastery. Students requiring remediation are not prevented from moving forward and learning new material while still gaining mastery over prior material.

MAPS expects that 10-15% of its student body will require specialized services. However, some students (both general and special population) may require more intensive instruction than only the traditional classroom environment can provide. Thus, MAPS will create this intensive environment and embed it into its school schedule. For example, all students will report to school by 8 a.m. for regular instruction time. The day begins with several pull-out groups from 8:30-9:00 am which provide structured time for direct instruction, intervention and enforcement to students with learning disabilities, English language learners, and general education students who are struggling with academic work.

PUPIL PERFORMANCE STANDARDS

MAPS's academic standards will be fully-aligned with Indiana and Common Core Standards. Each will be cross- referenced to the Indiana Curriculum Frameworks. These standards will also affirm punctuality, excellent study habits, school attendance, and participation in classes. MAPS aims to have a student culture that is naturally focused on promotion only and not retention. MAPS' standards of learning go above and beyond what the state of Illinois requires of its elementary and middle school students. Thus, MAPS expects to produce students that believe in only moving forward and not backwards in their educational endeavors.

Promotion

At MAPS, promotion is an ongoing process throughout the school year. The Montessori teacher observes a student, and their lesson progress and moves them in their grade level of work accordingly. The only time a Montessori teacher may consider retaining a student is when considering promotion to a new age-level group. (i.e. ages 6-9 to ages 9-12). MAPS will develop promotion policies which will have retention as the very last outcomes. Prior to that, MAPS' data driven student engagement will help students reach grade-level milestones.

Graduation

A student will receive a diploma from MAPS upon the successful mastery of all Montessori lessons and K-5 learning standards. During their 5th grade year, MAPS students will complete an Independent Study that allows them to discover and do something new and interesting. The project will also include an in-depth research paper on their topic, and a presentation board that they will use to present their Independent studies to the MAPS community. In their final year as MAPS students, students will also have to participate in a final class production.

Attachment 2-4 contains additional information about this section.

School Calendar and Schedule

Students will begin school at 8:00 a.m. From 8:00-8:15, they will check in and get settled in. From 8:15 – 8:30, there will be morning class meeting time. During this time, students will sit together where the teacher will make any announcements, scheduling changes, or other alterations to the day. Students will be given the task of looking over their weekly goals, assessing which goals they have met, and those they are still working on. From that list, they must determine their academic tasks for the morning. Students are then dismissed when they have determined a balanced task list for the day that accurately reflects the weekly goals outlined in a one-on-one conference with the teacher.

From 8:30 – 9:00, students will engage in pull-out special focus time. Students identified through AIMS/ACCESS assessments as in need of ESL instruction, intervention, remediation or special education services will proceed to a small group of their peers to receive targeted lessons. These targeted lessons will provide additional instructional hours directed at the students who are struggling to meet academic expectations. Students who are not grouped for remediation or

intervention will begin their Montessori work. They will choose an academic task (math materials, grammar boxes, etc.), find a comfortable place to work and potentially another student to work with, place a mat on the floor and begin the task at hand.

At 9:00, everyone will then pursue uninterrupted Montessori work until 12:00. During the work period, the teacher will give lessons on various topics related to the theme at hand which is determined from the overarching lesson given to the entire class sometime prior to this day. These lessons are carefully planned and taught in sequence to each child, and they require specific work to be completed after the lesson (akin to completing a math worksheet after a math lesson in a traditional classroom)

Additionally, each student is assigned to a conference group (Monday, Tuesday, Wednesday or Thursday) where they will have a weekly meeting with the teacher to review goals, completed tasks, homework completion and any other academic or social issues that may be influencing the child. The teacher will use this time to give students targeted verbal feedback on their work.

At the end of the morning work session, students gather together again to update journals of their morning work (if they did not already do this while working), noting which tasks they have completed and which need further attention. This is an ideal time for the teacher to identify a plan of additional support, either for the day or long term, for students the teacher has observed to be struggling academically in certain areas.

Students attend lunch/recess from 12:00 – 12:45. They then return to class for afternoon work. Afternoon work session follows a similar process to the morning work session; however, there are likely to be more classroom interruptions for remediation, enrichment (art, drama, dance, etc.), P.E., or additional pullout groups as needed. These sessions end at 1:30.

From 1:30 – 3:00, a block of time, similar to the morning groups, is set aside for general work time or those needing additional intervention. The formal academic day ends at 3:15 p.m. when students clean the room up and place things back in order.

Attachment 5, provide the school's proposed calendar for the first year of operation as well as a sample schedule.

SCHOOL CULTURE

MAPS students will be educated about themselves, their environment, other cultures, and their communities. Montessori teachers will respect students' individual differences, emphasize social interaction and educate the whole personality rather than teaching specific knowledge. Students will learn to live carefully and respectfully; demonstrate compassion and caring; and develop a sense of confidence, competency, and respect for others which enables them to be inclusive and live with dignity.

Social/Emotional Learning

In anticipating the social emotional needs of students, MAPS will look at five domains in which such needs may arise. They are (a) school related stress, (b) peer related stress, (c) needs of at-risk students, (d) home related stress, and (e) identity. These domains are addressed briefly below.

- *School Related Stress.* For many elementary school students, the demands of school can be new and exciting, but can also be stressful.
- *Peer-Related Stress.* Pressures to fit in and belong can be stressful for students. Many interactions happen throughout the day with classmates and friends.
- *Needs of At-Risk Students.* Students who need special care and attention for developmental or learning delays will be attended to and carefully monitored.
- *Home Related Stress.* Students are often faced with home related issues that directly impact their school success. It becomes difficult for students to focus on school when they are worried about a situation that has occurred at or near home.
- *Identity.* Erikson describes the adolescent phase as one in which children explore their independence and develop a sense of self. It is a time marked by identity versus confusion. For adolescents, their sense of self begins to be more drastically impacted by interactions with peers, rather than family.

SUPPLEMENTAL PROGRAMMING

MAPS will offer supplemental programming as part of its Montessori education. This includes access to STEAM opportunities, social emotional learning, and other opportunities to encourage holistic development. This will include:

- *Homework Center.* MAPS' homework center will provide support for students who are not completing homework independently. This provides a net for students who may not have the internal motivation, basic skills and/or adult support at home to complete homework.
- *Early Morning and After School Programs.* To address the needs of working parents and provide extra hours in the school day, MAPS will have an optional Early Morning breakfast program and an optional After School program.
- *Drama.* Every class at MAPS will participate in a performance.
- *Music.* MAPS' music curriculum seeks to develop in its students a deep understanding, appreciation and understanding of the subject.
- *Visual Arts.* The visual arts will be incorporated into all areas of MAPS' curriculum.

SPECIALIZED POPULATIONS

MAPS expects that most incoming K-1 students will not have had academic pre-school experience and will thus begin their first year of school at MAPS. MAPS also expects that 10-15% of its student body will have a specialized need. To determine this, MAPS will use Pearson AIMSweb testing for academics and the WIDA-ACCESS placement screener (W-APT) for English Language Learners.

Use of Embedded Differentiation

MAPS students will receive differentiated instruction in the morning and afternoon. Because special education and students needing remediation will be included in the general education classrooms, all MAPS teachers will be trained in either the Wilson Method or the Orton-Gillingham Method of reading instruction. These programs are phonics-based reading programs which encourage reading fluency.

MAPS curriculum will use a multi-level model to respond to specialized at the classroom, group, and individual level. The model focuses on behavior and academics. Work at each level is influenced by data collected from assessments administered during the year. Teachers will regularly meet to review data and adjust interactions.

English Language Learners

MAPS anticipates that 4% of its students will be classified as English language learning (most likely speakers of Spanish as a native language). MAPS has a goal to support students in their acquisition of the English language while requiring academic rigor for English language learners in the form of native language reading and writing fluency. MAPS will develop a strategy through which it will serve these students.

ADMISSIONS POLICY AND CRITERIA

MAPS will have an open admissions policy which uses a random, blind lottery for selection of incoming students pursuant to Indiana Charter School Law. The only exception to lottery procedure will be for siblings of current MAPS students. These students will be accepted directly without needing to enter the lottery.

Recruitment efforts will be targeted to communities within a four-mile range of each of the MAPS' Campuses. Flyers, social media, and events will be a primary means of recruitment. An online and paper admissions application will be available to the public in March of each year. There will also be a minimum of two Open House events for Prospective Parents and Students. In addition, staff members will visit area preschools and elementary schools for recruitment events, pending the availability of staff.

Included in the application packet will be a background and history of MAPS, descriptions of academic programs, student disciplinary code requirements, dates for Open Houses and

application submission deadlines.

Details about the lottery procedure regarding the foregoing is contained in **Attachment 6**.

SCHOOL DISCIPLINE

MAPS believes that the purpose of discipline is to educate young people in the long-term life skills they need to be successful in and out of the school setting. MAPS staff will make every effort to solve challenges directly with students, and they will first seek first to use proactive approaches centered around encouragement and helping students to feel belonging and significance in the classroom to address student's misbehavior.

In accordance with the Montessori philosophy, natural and logical consequences will be the main tools used to discipline students. When this direct, proactive approach fails to resolve the issue, students' parents will be invited in for a conference to work in collaboration with the school to resolve the issue. The issue will be documented on a behavior referral, the appropriate school administrator will be informed, and a Level I intervention plan will be created. Teachers will monitor student progress and report progress regularly to parents and school administrators. 80-90% of issues will be handled on the classroom level.

When an issue is chronic and not able to be resolved on the classroom level, a school administrator will then become involved. The issue is documented on a behavioral referral and a conference is set up with the child, teacher, parents, school administrator and any specialists the school thinks might be helpful. With the help of this team, a Level II intervention plan is developed.

Depending on the issue, suspension may be considered a natural consequence. Suspendable misbehaviors will be determined by the School Climate Committee and incorporated into the school's handbook. Before the meeting, an administrator will do a classroom observation of the student using a systematic observation form. Together, the parent, teacher and administrator will fill out a functional behavioral assessment and a behavior intervention plan will be formed.

PARENT AND COMMUNITY INVOLVEMENT

Parents will be an integral part of MAPS' daily operation. During its incubation stage, MAPS will provide workshops for parents on the charter school process and how to ensure their child has an equal chance to become a student at MAPS or any other local charter school. During the school year, MAPS will have regular workshops for its parents that will educate them in the Montessori philosophy and method, provide information that will allow them to aid their child with Montessori homework assignments and projects, and address the social and emotional needs of their children at each stage of development.

Parent participation will include the following:

- MAPS hopes to see parents as regular fixtures in the classrooms. In the Montessori Method, parent observation and communication with the instructor about their child is

critical. Parents will have the opportunity to schedule a time to observe the classroom and spend the day with their child.

- MAPS students and parents will participate in biannual teacher conferences. These conferences have two parts: first, the child is included in the conference and asked to reflect upon his/her performance; the student is then dismissed and the parent and the teacher continue the conference. Conferences are a conversation about progress and productivity in the learning environment.
- MAPS will strive to have several committed room parents each year. The room parents will assist with carpooling, dinner meetings, and class productions. There will also be parent volunteers to assist with various cultural lessons and independent study projects as well as language integration lessons and activities.
- Interested parents will be members of MAPS' school advisory council and parent-student support team. At MAPS, there will also be a committee of parent volunteers in place that resemble the similar roles of PTAs in other public schools. MAPS' administrative team will also invite two parents every school year to serve on the Charter Infraction Hearing Board .

SCHOOL LEADERSHIP TEAM

General Oversight

General oversight will be provided by the Board Chair and President/CEO Vivian Cain, who has over 20 years of school administrative experience. She is Montessori-certified at both the primary and elementary levels by the Association of Montessori Internationale (AMI). She is not only an experienced classroom practitioner, but she has also served many years as a successful school leader. Ms. Cain will provide oversight to MAPS, as well as supervise the hiring of the school's principal.

Other board members who will play a key role include the following - please see their board profile forms and resumes in the appendices.

Full Name	Current Job Title and Employer	Position with Proposed School
Jonathan Kroenke	Staff Accountant; Availay, LLC	Board Treasurer
Joy Reese	State-Certified Educator; Montessori Educator; OES Integrator	Board Member

Consultants

The MEC will work with financial, legal, accounting, fundraising, and program planning professionals as part of its predevelopment work. This work will help The MEC grow its board in terms of size and capacity prior to opening MAPS.

School Staff

- *Principal.* This position is responsible for management of all aspects of academic programs, including but not limited to the development and implementation of the curriculum and the management of the teaching staff. He/she will be hired by June 2020 and will report directly to the President/CEO. Position description is contained in **Attachment 9**.
- *Director of Finance & Operations.* This position will supervise budgeting, fundraising, human resources, information technology, marketing, and other key responsibilities. He/she will be hired by June 2020. Position description is contained in **Attachment 10**.
- *Teachers.* These individuals will provide instruction for students. Current identified candidates include (1) Laura Burger - State-Certified Educator; Montessori Educator; (2) Saba-Na'Imah Berhane -State-Certified Educator; and (3) Lisa Delaphane - State-Certified Educator; Montessori Educator. Others will be identified. All will be hired by June 2020. Two teachers hired will also have certification to provide specialized services. Resumes for candidates and position descriptions are contained in **Attachment 9**.
- *Teacher Assistants.* These individuals will provide classroom support to the teachers. They will be hired by June 2020. Position description is contained in **Appendix 10**.
- *Admin Assistant.* Will provide general administrative support. He/she will be hired by June 2020. Position description is contained in **Appendix 10**.

OPERATIONS PLAN & CAPACITY

LEGAL STATUS AND GOVERNING DOCUMENTS

As noted herein, MAPS will be an initiative of The MEC - a 501(c)(3) tax-exempt organization. Documents attesting to this are found in the attachments below:

Attachment 11 which contains:

- Tax-Exempt Letter.
- Board Bylaws.
- Articles of Incorporation.
- Board Finance Policy

Attachment 12 which contains the signed statement of assurances.

GOVERNING BOARD

As an initiative of the MEC, MAPS will be administered by The MEC Board of Directors. The Board of Directors will meet a minimum of once per month, and it will work to ensure that MAPS is properly maintaining the highest standards of legal, compliance, operational, and academic performance. Monitoring each of these areas will occur through various standing and *ad-hoc* committees which are charged with oversight and management of key focus areas. The Board of Directors' success in providing this level of oversight will closely depend upon its ability to develop positive working relationships with MAPS. This will ensure that the Board has the information needed to make informed decisions in a timely manner.

Board Structure

According to The MEC's bylaws, the minimum number of Directors will be 10, and the maximum number will be 15. Board Officers will include a Chair, Vice-Chair, Secretary, Treasurer, and President/CEO. At present, both the Chair and President/CEO roles are held by Ms. Vivian Cain, the founder of the MEC. Ms. Cain will continue to hold both roles throughout predevelopment. This role will be split at the end of predevelopment – at which point Ms. Cain will serve as Chair, with the organization hiring a President/CEO at that time.

The President/CEO will have responsibility for MAPS as well as other aspects of the MEC's work. He/she will hire and directly supervise the Director of Finance/Operations as well as the Principal. The Director of Finance is responsible for finance and operations, while the Principal will be responsible for the day to day operation of MAPS in terms of programs, personnel, program and service support, environment, enrollment, recruitment, and constituent relationships.

Committees

The MEC bylaws call for the creation of one standing committee: The Executive Committee. The Executive Committee has the primary responsibility of ensuring that the President/CEO consistently works towards serving the MEC's work. For MAPS, this means that the President/CEO will supervise the work of the MAPS Principal in achieving MAPS goals and mission. This is achieved by establishing annual goals for the Principal which are then formally evaluated on an annual basis. These goals are intended to further MAPS' mission, and they are both administrative and academic in scope.

Under the leadership of the President/CEO, the MAPS Principal charges the school staff to carry out their parts in meeting MAPS goals, with the Principal providing the guidance, support, and leadership needed throughout the school year in order to bring these goals to fruition. These board responsibilities and others are summarized in **Attachment 14**.

The Executive Committee communicates on a weekly basis regarding these issues with both its members as well as the President/CEO and the Principal's performance. The Committee also regularly meets throughout the year in order to discuss any critical issues, preemptively address challenges which might prevent goals from being met, and provide the President/CEO with needed support. This process continues throughout the school year, and it culminates with the President/CEO's annual review which addresses not only the extent to which annual goals are met, but also other aspects of job performance. The President/CEO, in turn will evaluate the Director of Finance and Operations and Principals. The Principal will evaluate all school staff.

The Executive Committee will be composed of all Board Officers and the President/CEO as a de-facto member. It will address issues pertaining to executive leadership, policy formation, and standing within the community.

The Board Chair will establish other standing and *ad-hoc* committees in order to provide in-depth analysis and monitoring of pertinent issues. Committees will be staffed by board members, select administrators, and volunteers with key expertise. These committees will include (but are not limited to):

- *Finance & Facilities Committee*. Ensures financial and facility issues are properly addressed. This Committee will be composed of the Board Treasurer, President/CEO Executive Director, Director of Finance and Operations, a Certified Public Accountant, and other board members or individuals, as needed.
- *Personnel Committee*. Ensures human resources issues are properly addressed.
- *Education Committee*. Ensures the school academic concerns are properly addressed. This Committee will be composed of two Board Members, President/CEO, Principal, key teachers, and other stakeholders.
- *Resource Development & Marketing Committee*. Ensures the MEC and MAPS have access to resources needed for long-term success. This Committee will be composed of

the Board Chair, other board members, President/CEO, and Director of Finance and Operations.

Such committees will meet at least once per month to discuss their respective focus areas and continue these discussions through phone conferences or email threads. Committee Chairpersons will develop a formal summary of issues and present their findings to the entire Board of Directors during monthly meetings. The President/CEO will also provide reports to the Board during monthly meetings, and the Board Secretary will ensure that minutes of all events are taken. This system not only allows the Board of Directors to monitor the school's progress, but also creates a lasting record of activity which can be referenced indefinitely.

Board Member Roles

The MEC has identified several key board members at this point.

Full Name	Current Job Title and Employer	Position with Proposed School
Vivian Cain	Director; Maria Montessori International Academies	Board Chair; President/CEO
Jonathan Kroenke	Staff Accountant; Availay, LLC	Board Treasurer
Joy Reese	State-Certified Educator; Montessori Educator; OES Integrator	Board Member

As noted later herein, the MEC is recruiting additional Board members to advance MAPS. Potential Board members are expected to embody the highest standards of commitment and service. Each member will be expected to contribute to MAPS' academic, operational, and financial success to the best of their respective abilities. Each Board Member will also be required to serve on at least one committee or the school advisory council in addition to actively participating in fundraising initiatives.

The Board of Directors is also expected to ensure that its recruitment practices are designed to attract quality applicants willing and able to fill specific roles across a variety of skill-sets.

Existing Non-Profit Information

Will the existing non-profit board govern the new school, or has the school formed a new non-profit corporation governed by a separate board?

- Response: As noted earlier, the MEC Board will govern the school, as informed by the work of the Education Committee. However, it is seeking new board members as it further builds its capacity.

If the non-profit's current board will govern the charter school, what steps have been taken to transform its board membership, mission, and bylaws to assume its new duties? Describe the plan and timeline for completing the transition and orienting the board to its new duties.

- Response: The MEC is pursuing capacity building efforts to increase its ability to meet these responsibilities.

Explain the procedure by which board members have been and will be selected. How often will the board meet? Discuss the plans for any committee structure.

- Response: Please see by-laws. This process is being refined to better serve the needs of The MEC and MAPS.

*Describe the board's ethical standards and procedures for identifying and addressing conflicts of interest. Provide, as **Attachment 15**, the board's proposed Code of Ethics and Conflict of Interest policy.*

- Response: The MEC Board is currently developing its ethical standards and code of ethics. This will be complete prior to starting predevelopment.

Identify any existing relationships that could pose actual or perceived conflicts if the application is approved; discuss specific steps that the board will take to avoid any actual conflicts and to mitigate perceived conflicts.

- Response: The MEC began as the result of Founder Vivian Cain's experience with the Montessori method and her role as a Montessori innovator. The MEC is working to refine its structure as Ms. Cain transitions from holding the Chair/President CEO role to a role as Chair where she will only serve as the MEC's senior official.

The foregoing presents a perceived conflict of interest given that Ms. Cain owns both sites where MAPS Campuses will be located. The MEC will execute a lease with Ms. Cain to occupy these sites given that they meet the needs of the MEC and MAPS. Ms. Cain has cultivated these sites and developed them into Montessori-friendly learning environments as part of her ongoing efforts to advance Montessori within the community. Her agreement to renovate the facilities and lease them to the MEC for MAPS use not only reflects these sites' intended use, but also mitigates the need for MAPS or the MEC to take on long-term debt due to facility.

This process will be very transparent and will be governed by the forthcoming Conflict of Interest policy the Board will publish in June 2019. Predevelopment funding will be used to address the legal and financial counsel needed to facilitate the overall process.

Describe plans for increasing the capacity of the governing board. How will the board expand and develop over time? How and on what timeline will new members be recruited and added, and how will vacancies be filled? What are the priorities for recruitment of additional board members? What kinds of orientation or training will new board members receive, and what kinds of ongoing development will existing board members receive? The plan for training and development should include a timetable, specific topics to be addressed, and requirements for participation.

The Board is currently working with consultants in the area of academics, board development, finance, fundraising, and overall innovation. These consultants are helping the MEC improve its capacity at all levels - including the ability to operate MAPS. The MEC will continue to increase its capacity throughout the entire predevelopment process. Key capacity building milestones include the following:

- May 30, 2010: Grow board by five members in key capacity areas (education, real estate, academics, etc.).
- Separate Chair and President/CEO role by June 30, 2020
- Better refine role between President/CEO and Principal by January 30, 2020.
- Develop fundraising capacity by June 30, 2020.
- Develop strategic plan by August 2020.
- Develop increased familiarity with available state, federal, and local funding opportunities.

MEC is also developing policies for the Board that speak to the issues of recruitment, selection, and development. The policies will identify not only the attributes and skills that are necessary in Board members, but it will also address what Board members can expect of each other. The MEC will initially look for expertise in finance, law, facilities planning and management, fundraising, and personnel. Through a process of networking and research, the Executive Committee will recruit candidates who have the attributes and skills the Board has identified

Board members recruit candidates using the help of such organizations as the City of Indianapolis's Office of Minority Affairs, Community Action, Inc., and other Indianapolis charitable organization. Candidates will participate in personal interviews. The Committee will clearly articulate to each candidate, orally and in writing, the contents of the policy, the qualifications, and the performance expectations of Board members. In addition, the commitment of the candidates will be secured before nominations are presented to the full Board.

Board development will be an ongoing process. Each year, the Board will hold a retreat so Board members may get to know each other better, refine the mission and goals for the upcoming year, educate themselves on pertinent issues, and discuss the Board's success (or failure) at meeting its goals for the past year. Coordinated by the Executive Committee, Board members will conduct an annual evaluation of the Board as well as self-evaluations to ensure that each Board member is meeting his/her performance expectations, and contributing his/her skills in the manner best suited to the school's needs. The Board will also seek out experts in governance to give advice and provide feedback on its governance process.

ADVISORY BODIES

- **School Advisory Council Purpose.** Per its bylaws, The MEC will create a school advisory council for MAPS. This school advisory council encourages collaboration between the Board of Directors, President/CEO, Principal, key staff members (management & teachers), community members, parents, and students. The Board of Directors will create a school advisory council at least 120 days prior to opening a school. A school advisory council must exist as long as the MEC is legally mandated to operate a school.
- **School Advisory Council Composition.** A school advisory council will consist of at least five (5) and not more than fifteen (15) members composed of the Principal, a mix of key staff members (management & teachers), community members, parents, students, and other stakeholders.
- **School Advisory Council Chair.** The Principal serves as the school advisory council chairperson. He or she is responsible for conducting meetings pursuant to prevailing standards of order.
- **School Advisory Council Nomination, Election, and Tenure.** Members can serve a one-year term. A school advisory council can add or remove subsequent members at any time. Each school advisory council member may cast one (1) vote with respect to one (1) proposed position, vacancy, or removal. An affirmative vote of two-thirds (2/3) of the school advisory council. Members shall be required for election. A member selected to fill a vacancy or removal shall be elected for the unexpired term of his or her predecessor in office.
- **School Advisory Council Powers.** The following provisions apply with respect to the school advisory council's powers:
 - The school advisory council has powers to make decisions with respect to concerns of a non-governance, non-financial, or non-academic nature (e.g. planning of student fundraisers, field trips, certain after-school programs, etc.). These decisions resulting from these expressed powers will be presented to the Board of Directors during its monthly meetings in the form of a notification/consent agenda which is prepared by the President/CEO in response to information provided by the Principal. The Board of Directors may decide to

discuss this notification/consent agenda and subsequently elect to address any issues or concerns resulting therefrom.

- The school advisory council can also discuss any concern not specifically within its realm of responsibility or powers and present its suggestions to the Board of Directors. The Board of Directors must address these concerns through a written explanation within fourteen (14) days.
- **School Advisory Council Meetings.** School Advisory Council meetings should meet the following standards:
 - Regular meetings shall be held pursuant to a schedule of regular meetings which shall be established at the beginning of each academic year and shall state the regular dates, times, and places of such meetings. There should be at least one scheduled regular meeting each month.
 - Special meetings may be called by the Principal when he or she deems it for the best interest of the school advisory council.
 - The presence of not less than seventy-five (75%) percent of the school advisory council constitutes a quorum and shall be necessary to conduct business. A lesser percentage may adjourn the meeting for a period of not more than two (2) weeks from the date scheduled by these bylaws, and the President/CEO shall cause a notice of this scheduled meeting to be sent to all those members who were not present at the meeting originally called. A quorum as herein before set forth shall be required at any adjourned meeting.
 - Members of the school advisory council can participate in and act through the use of a conference telephone or other communications equipment by means of which all persons participating in the meeting can hear each other. Participation in such a meeting shall constitute attendance and presence in person at the meeting of the person or persons so participating.
 - The order of business for each meeting should include a roll call, review of minutes of the previous meeting, reports, old/unfinished business review, new business discussion, and adjournments.
 - Each school advisory council has one vote. All votes shall be by voice during all meetings.

GRIEVANCE POLICY

MAPS stakeholders (students, parents etc.) will be supported via a grievance policy (to be created during the predevelopment phase) through which they will be able to express concerns regarding school operation, academics, and finance. This policy will actively involve the school

advisory council as a well as the school culture committee. When needed, those concerns will be brought to the Board level (e.g. issues of finance, discipline, etc.).

PROFESSIONAL DEVELOPMENT

MAPS has an extensive professional development component in its teacher induction period. This will prepare teachers to develop rigorous and relevant lessons, face classroom challenges, develop collaborative relationships, and share their expertise. Weekly staff meetings are focused on professional development in areas of weakness as identified by student data, staff culture evaluation, or other academic or cultural data. MAPS will devote significant time to professional development surrounding data-driven assessment and analysis.

General education and special education will all share information, strategies and best practices with one another throughout the year. Special education-certified teachers will conduct workshops for all other staff. Because Montessori education is an inclusive model for students with many individual needs, it is important that staff with specialized knowledge help all staff meet students' needs.

Teacher Support

Teachers will develop an Individual Growth Plan (IGP) during the first quarter of the school year. The Principal will meet with each teacher to set goals and draft the plan. The Principal will also meet with each individual to review the IGP and discuss the goals. Goals will be selected from the standards adopted by the Indiana State Board of Education and Montessori pedagogical principles.

MAPS will also provide another support opportunity via its staff meeting and professional development days. Opportunities can include:

- Development of professional relationships.
-
- Monthly support gatherings of new teachers.
- Monthly support meetings of mentors.
- Creation of an atmosphere of open communication and collective problem solving among all of the new teachers and mentors.
- Professional development for new teachers and mentors specific to their needs and concerns.
- Support of new teachers in the creation and progress of their IGPs.

PERFORMANCE MANAGEMENT

Academic Goals

The educational goals and metrics outlined below will be used to monitor school-wide progress throughout the year (interim assessments, AIMS web/MAPS benchmarking) in addition to mandatory state assessments administered cumulatively at the end of the year. This allows necessary corrective instruction to be made available following data results from the assessments.

Goal	Metric
Overall - % meet or exceed	Testing
Reading - % meet or exceed	Testing
Math - % meet or exceed	Testing
Science - % meet or exceed	Testing
ELL - % meet or exceed	Testing
IEP - % meet or exceed	Testing
Average student improvement**	Testing
Attendance	Average Daily Attendance
Retention rate	Students re-enrolling
AIMS/MAP benchmarks - % students making quarterly improvements	Quarterly progress reports
Repeat offenders - Levels 2 & 3	Charter infractions record

Student writing samples - marked 3 (meets standards) out of 4 (exceeds standards)	Scoring rubric
Parental Involvement - % of parents that feel they are "empowered" members of child's support team	Parent participation in parent-teacher conferencing -Parent survey -Interviews with parents

In addition to the goals and metrics outlined above, MAPS will evaluate student growth based on the following criteria:

- *Portfolios.* These will provide one perspective for assessing student growth. Student reflection will be an integral part of the portfolio. Writing samples from portfolios will be used to assess MAPS progress toward student writing goals. Scoring rubrics will be developed to assess the portfolios, which faculty will be trained to use.
- *Demonstrations.* These will provide another means of assessing student growth. Demonstrations may be a part of a Literacy Portfolio, Science Fair, or a Mathematics Assessment. The key element will be students illustrating their attainment of specified standards to a panel of judges; standards will be established based on the state-adopted curriculum frameworks.

Interim Assessments

In addition to traditional Montessori daily performance assessments and quarterly AIMSwebPlus/MAP benchmarking, MAPS will administer three-four interim assessments per year as well as state required exams to provide supplementary evaluation. When students are not making benchmark improvements, teachers and educational leaders can implement appropriate interventions immediately. If first level interventions indicate needed improvement, the building-level IEP team will meet and assess whether there is enough data to evaluate a student for an IEP or if more data is needed.

MAPS chose AIMSwebPlus and MAP assessments due to their reputation. AIMSwebPlus is a screening and progress monitoring assessment which uses data to identify students at risk of failing. It measures student progress in an accurate and timely manner – with high predictive validity and reliability.

Measures of Academic Progress (MAP) is an adaptive assessment program that provides information about the progress of each child. MAP tests in all core subjects. These tests adapt to student's ability. It can help identify what a child knows and needs to learn.

MAPS teachers and the Principals will also create interim exams which are aligned to Indiana standards and the Montessori curriculum. The exams align with ISTEP testing environment (in question style and length) and will include questions more rigorous than those required only to meet state standards.

Type and Frequency of Performance Assessments

Test & Grade Level	August	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
Interim Assessment: Reading, Writing, Math											
AIMSweb;PLus MAP Suite of Programming											
ISTEP											

Operational Goals

MAPS will build an organizational structure which will provide measurable, consistent data around four key indicators of operational quality: Financial Performance and Sustainability; Board Development and Stewardship; Parent/Community Engagement; and Teacher Satisfaction. This structure will include formal reporting mechanisms and will be electronic-based whenever possible in order to ensure ease of use and consistent results. The following table summarizes each indicator and its corresponding metric.

Five-Year Operational Measures, Metrics, and Goals

Measures	Metrics	Five-Year Operational Goals				
		Year 1	Year 2	Year 3	Year 4	Year 5
Financial Performance & Sustainability						
Student Enrollment	Actual student enrollment, per statutorily required reported count(s)/ Budgeted student enrollment	216	216	216	216	216
Fundraising	Funds raised.	\$500,000	\$500,000	\$500,000	\$500,000	\$500,000
Grant Solicitation Success Ratio	Total proposals submitted --- Total successful proposals	80%	40%	30%	30%	30%
Occupancy Expense	Total occupancy costs - Total revenues	TBD	TBD	TBD	TBD	TBD
Annual Audit	Absence of material or repeated audit findings in annual audit by qualified independent auditor	100% Compliance	100% Compliance	100% Compliance	100% Compliance	100% Compliance

<i>Board Performance & Stewardship</i>						
Board Member Skills,& Knowledge	Collective years of board member experience.	180	200	225	250	300
Board Member Commitment	Percentage of Board members who attend more than 80% of Board Meetings	100%	100%	100%	100%	100%
Setting Expectations	<p>Short- and long-term, Board-approved, SMART performance goals, including at least one goal for each of the following areas:</p> <p>Student achievement.</p> <p>Student academic growth over time.</p> <p>Financial health.</p> <p>Operational efficiency.</p> <p>Organizational development.</p>	100%	100%	100%	100%	100%
Ethical Conduct	Absence of violations of authorizer-approved Board policy governing ethical matters including conflicts of interest	0 Violations	0 Violations	0 Violations	0 Violations	0 Violations

Regulatory and Reporting Compliance	Ability to meet Funding/operating Conditions.	100%	100%	100%	100%	100%
Leadership Oversight and Evaluation	Pursuit of Goals	Quarter & Annual Evals.	Quarter & Annual Evals.	Quarter & Annual Evals.	Quarter & Annual Evals.	Quarter & Annual Evals.
Contract Management and Oversight	Management and oversight	100%	100%	100%	100%	100%
Public Accountability and Transparency	Clear, accurate, regular communication	Annual Report; Quarterly Newsletters	Annual Report; Quarterly Newsletters	Annual Report; Quarterly Newsletters	Annual Report; Quarterly Newsletters	Annual Report; Quarterly Newsletters
Planning	Completing strategic, business, and fundraising plans	Fundraising plan; business plan.	Plan Implementation	Strategic Plan	Plan Implementation	Plan Implementation
Securing the Future/Continuous Improvement	Measurable improvement in the school's academic and operating performance over time, aligned with the school's performance contract goals	10% - 20%	10% - 20%	10% - 20%	10% - 20%	10% - 20%
Self-Evaluation	Formal annual Board review of performance and improvement against annual targets and long-term academic and operating performance goals.	Annual Review	Annual Review	Annual Review	Annual Review	Annual Review

<i>Parent & Community Engagement</i>						
Satisfied Students and Parents	Percentage of students and parents who give the school a high rating on satisfaction surveys, with response rates of at least 75% from parents and at least 80% from currently enrolled students broadly representative of the student population	80%	80%	80%	80%	80%
Re-enrollment Ratio	School's rate of student re-enrollment from year to year, compared to district average and/or the school's prior-year re-enrollment rate	95%	95%	95%	95%	95%
Excess Student and Parent Demand	(Enrollment + Waiting List) Current Enrollment Capacity					
<i>Staff Satisfaction & Development</i>						
Staff Retention Percentage	Number of Existing Staff Number of Retained Staff	100%	95%	95%	90%	90%
Staff extra-curricular engagement	Staff engaged in extra-curricular engagement	15%	15%	20%	20%	20%

FACILITIES

MAPS will need eight classrooms (four at each campus) at approximately 750 square feet each, a conference room, a multipurpose lunch/play room, a front office, an art room, a music room, storage space, and offices for the leadership team. To meet these needs, MAPS will be housed in two facilities which are owned by Board Chair (and acting President/CEO) Vivian Cain. The MEC will lease these facilities to provide a home for both of its MAPS Campuses.

- Campus 1: 7507 Michigan Road, Indianapolis IN, 46268.
- Campus 2: 4370 Weston Pointe Drive, Zionsville/ Carmel IN 46077.

Ms. Cain has prepared these facilities for use as ADA-accessible Montessori schools, as she operates a private Pre-K program in both of them. Total peak-capacity square footage for each campus is 15,000 sf. Each Campus has an outdoor play area and features a number of safety features (including a soft landing surface) as well as play tools and manipulatives to encourage engagement.

Ms. Cain will renovate each facility at a cost of \$875,000 per site (pursuant to approval of a MAPS charter) to better facilitate education of K-5 youth and manage the flow between the existing Pre-K programs housed in the building and MAPS students. Renovations will begin as soon as the MAPS charter is approved and will be complete for a punch list review by March 2020 - well before the school's August 2020 opening goal. Through these renovations, classrooms will be expanded to a 2nd story, HVAC systems will improved, and enhancements will be made throughout the entire building to facilitate a seamless Montessori education experience.

The budget contains sufficient funds to meet the lease for each Campus as follows:

- Campus 1 Lease: \$16,000 per month. Includes occupancy, utilities, CAM, and costs of renovations.
- Campus 2 Lease: \$21,000 per month. Includes occupancy, utilities, CAM, and costs of renovations.

Attachment 20 contains a letter of intent from Ms. Cain to provide The MEC with a lease upon charter approval. It also contains representative photos of each campus.

BUDGET AND FINANCIALS

BUDGET

The MEC will maintain appropriate MAPS governance and managerial processes and financial controls that are reviewed and revised as needed by the President/CEO, Director of Finance and Operations, Finance Committee, Treasurer, and the Board of Directors. These processes are noted in in Financial Controls Manual found within Board Governing documents attachments.

- *Transparency.* In accordance with GAAP, The MEC is committed to facilitating transparent financial processes for MAPS.
- *Clarity.* Transparent financial processes will lead to clarity of application. All proposed financial processes will be clear so that all stakeholders can fully understand their application.
-
- *Stewardship.* Transparent and clear financial processes encourage increased stewardship of all resources.
-
- *Reflection.* Financial processes will encourage active reflection which will serve to improve overall financial strength.

Revenue

A summary of procedures for addressing revenue follows:

- All incoming checks will be opened by the President/CEO and delivered to the Director of Finance and Operations.
- All cash receipts will be primarily received by administrative assistants who indicate amounts received on receipts to customers (parents).
- The Director of Finance and Operations will reconcile cash receipts against the receipt book.
- An administrative assistant will prepare deposit slips and copies all checks to be deposited.
- The Director of Finance and Operations will take deposits to the bank.
- A board member will open all bank statements and verify any direct deposits to the bank account.

Expenditures

A summary of procedures for addressing expenses follows:

- Expenditures will be processed only with requisitions approved by the President/CEO. Requisitions will be paper-based in Year One, and electronic thereafter.
- An administrative assistant will order requested items after the President/CEO approves the requisition. The approved requisition will be attached to the invoice when it arrives.
- The Director of Finance and Operations will prepare a check for the invoice amount and attach it to the requisition and invoice.
- Two board members will sign the check and review the back-up materials.

Timekeeping and Payroll

A summary of procedures for addressing timekeeping and payroll follows:

- Employees will sign-in utilizing a time clock.
- The Director of Finance and Operations prints time reports on a bi-weekly basis.
- The President/CEO will review the hours and indicates approval for the Director of Finance and Operations to process payroll by initialing the documents.
- The Director of Finance and Operations will process payroll using a payroll service such as Paychex or ADP.
- An administrative assistant will organize the checks for distribution.

Reporting

- Leadership will produce monthly financial reports for board review. These reports include a cash flow update, cash and banking summary, YTD revenue and expenditure summaries, enrollment report, and investment & interest reports.
- The Director of Finance and Operations will compile financial and monetary information which is reviewed by the President/CEO daily, the Finance Committee monthly, and the Board of Directors monthly.
- The Director of Finance and Operations will work with each department leader on a monthly basis to ensure that department budgets are properly monitored.

- An independent auditor will be engaged to conduct an annual review of the financial as well as compliance reports and renders an opinion as to the level of internal control and the accounting methods utilized and whether those methods are consistently applied.

FINANCIAL MANAGEMENT

The proposed leadership team has extensive experience supporting all non-academic aspects of school management. General oversight will be provided by the President/CEO. The Director of Finance and Operations (working under President/CEO's supervision) will be responsible for the day-to-day aspects of providing non-academic support. This Finance and Operations candidate has over 10 years' experience in providing operational support in business, nonprofit, and public school settings. The Director of Finance and Operations candidate will also have a strong understanding of information technology, fundraising, compliance, accountability, graphic design, and a host of other non-academic (yet crucial) operational concerns.

MAPS will outsource some of its more labor-intensive operational concerns when it is financial feasible to do so.

- *Information Technology.* Information technology concerns will be handled by a certified vendor capable of designing and deploying a LAN. This vendor will also provide information technology technical support. MAPS will utilize the E-Rate program to fund the majority of its start-up Information Technology costs.
- *Payroll.* Payroll will be initially handled internally in conjunction with a payroll service (e.g. QuickBooks, Paychex, etc.).

Accounting

The MEC and MAPS will work with a certified CPA to provide all auditing services required by law pursuant to GAAP.

Fundraising and Development

The MEC will work with a consultant to facilitate growth in these areas throughout the predevelopment process.

Attachment Index

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Not every requested attachment was needed. Please note the following index

Attachment	Present?
Attachment 1	Yes
Attachments 2 – 4	Yes
Attachment 5	Yes
Attachment 6	Yes
Attachment 7	No
Attachment 8	Yes
Attachment 9	Yes
Attachment 10	Yes
Attachment 11	Yes
Attachment 12	Yes
Attachment 13	Yes
Attachment 14	Yes
Attachment 15	No
Attachment 16	No
Attachment 17	Yes
Attachment 18	No
Attachment 19	No
Attachment 20	Yes
Attachment 21	No
Attachment 22	Yes
Attachment 23	Yes
Attachment 24	Yes
Attachment 25	Yes
Attachment 26	Yes

Attachment 1:

Resumes

Maria Montessori International Academy, Indianapolis, Indiana. 2001 to present
A privately Montessori School for ages 18 months to 12 years.

Head of School: Responsible for building maintenance, instructional leadership, community and public relations, fundraising, human resources and visionary execution.

- Responsible for 250 students and 25 faculty and staff members
- Manage a \$ 600K school budget
- Influence school cultures by building a vision, stimulating innovation, and encouraging performance:
Net Result: Created an international school with a Montessori curriculum that encompasses teachers from India, Puerto Rico, France, Canada, and Philippines in addition to Bilingual classrooms in French/English or Spanish/English.
- Started a Montessori school with \$40,000 and grew from one classroom to five classrooms within a 3 year period. **Net Result:** annual revenues increase from \$120,000 to \$750,000.
- Renovated \$1 million school project of existing building. **Net Result:** Raise the capital to make renovation and purchase the building while meeting all fire codes and Department of Health regulations for operating a school.
- Create a school with high academic results: **Net Results:** 98% of all students were at least one to two grade above their peers in reading, math, and writing.
- Complied with Indiana state standard for Curriculum development for grades K-6th

Maria Montessori International Academy, West Carmel/Zionsville Indiana. 2009 to present
A privately Montessori School for ages 3 months to 12 years.

- Responsible for 250 students and 25 faculty and staff members
- Manage a \$1.5 million school budget
- Coordination of all faculty professional development
- Established goal setting and evaluation process for faculty and staff
- Revitalized school branding, niche marketing and all communication vehicles
- Work collaboratively with the Board of Trustees in establishing Strategic Planning, Development, Alumni relations and Grant writing to further enhance the school
- Renovated \$1 million school project of existing building. **Net Result:** Raise the capital to make renovation to all fire codes and Department of Health regulations for operating a school for Indiana State Fire Marshal, FSSA, Hamilton Fire Marshal
- Create a school with high academic results: **Net Results:** 100 % of all students were at least one to two grade above their peers in reading, math, and writing.
- Complied with Indiana state standard for Curriculum development for grades K-6th

Maria Montessori International Academy, Brownsburg, Indiana. 2005 to 2010
A privately Montessori School for ages 3 years to 6 years.

Maria Montessori International Academy, Downtown Indianapolis, Indiana. 2005 to 2010
A privately Montessori School for ages 3 years to 6 years
A privately Montessori School for Underserve students ages 3 years to 6 years

Overall Responsibility for all the schools:

- Responsible for the administrative success of all school programs.
- Ensures that the school is in compliance with all applicable governmental laws and regulations.

ORGANIZATION

- Coordinates scheduling of, and attends, all required school functions and activities.

FINANCE

- Serves as Business Manager
- Manage the bookkeeper with all financial issues and long term planning.
- Applies for and maintains grants and Manage coordination and execution of fund-raising plans.

PERSONNEL Teaching Staff:

- o Manage, recruitment hire of of teaching staff
- o Supervises the Spanish and Music teachers/programs, coordinating across all classrooms Non-Teaching Staff:
- o Selects and employs non-teaching personnel
- o Administers equitable systems of compensation, health insurance, taxes, working conditions and professional development of all staff in cooperation with the Personnel Chair

ENROLLMENT

- Represents and explains the school mission program to prospective families.
- Oversees and coordinates recruitment of students.
- Informs parents and prospective parents of enrollment policies.
- Performs all admissions tasks necessary to achieve school objectives.
- Oversees and coordinates enrollment of students from infant to 6th grade

• EDUCATION

- Works with Head Teachers to coordinate curricula.
- Helps guide Head Teachers in achieving their educational goals.
- Coordinates and attends all Head Teachers meetings.
- Serves as liaison between teachers and parents to resolve classroom issues.
- Maintains school discipline policy in a consistent and respectful manner.

PUBLIC RELATIONS

- Coordinates all internal and external school communications.
- Maintains constructive liaisons with other educational institutions and associations.
- Facilitates communication among all of the school's constituents and encourages their participation in school activities and events.
- Represents Maria Montessori International in the community at large.

SCHOOL FACILITIES, EQUIPMENT, DAILY OPERATIONS

- Oversees daily operations of school, ensuring a safe and friendly environment.
- Attends to tasks and responsibilities associated with successful operation of school (e.g. communication, security, maintenance) in an as-needed and sometimes hands-on capacity.
- Supervises maintenance of all school equipment.
- Supervises the maintenance of school as an aesthetically attractive and safe environment, in cooperation with the Maintenance Staff
- Maintains all lease and mortgage arrangements.
- Maintain facilities and equipment improvement.

OPERATIONS SUPPORT

- Remains informed of trends, research and legislation that may affect the school management, operation and policy.
- Advises Parents and staff when policy changes or action may be necessary.
- Maintains a comprehensive set of records on students, staff and prospective students.

LEADERSHIP

- Provide oversight ,monitor and evaluate equality implementation of Montessori pedagogy, curriculum, and programs
- Cultivate effective relationships with all constituents of the school
- Work directly with the staff to create a compelling culture which attracts, keeps, and motivates a diverse staff of top quality people, Support and mentor all staff
- Model and sustain a culture of giving, volunteerism, global awareness and citizenship at the school

S C Johnson, Racine, Wisconsin 2000-2001

A privately held \$6 billion global consumer products company with major brands including Raid®, Pledge®, and Windex®.

Consumer & Product Insights Research Analyst (Consultant): Responsible for providing insights into innovative product development through understanding of products from a sensory, consumer, and product use perspective.

- Directed product developers with appropriate strategies in new product or concept ideas with deeper consumer insights early in product development cycle.
Net Result: Launched two (2) new products with projected sales of \$18,000,000.
- Designed appropriate complex quantitative research and experimental design for a Blind Label, In-Home test to over 600 respondents to identify product improvements. **Net Result:** Improved market position from fourth to third place.
- Developed qualitative, focus groups and in home research of 28 diverse respondents that included video taping, story telling, collages making, picture taking, and ethnography. **Net Result:** Recommended acquisition of several companies and new brands to expand outside traditional lines of businesses.
- Led cross functional groups with in-home visits to discover consumer emotions, needs, wants, and attitudes that influenced purchases and uses for new toilet care product. **Net Result:** Projected to gross \$50,000,000 in three (3) years.

Hill-Rom Company, Batesville, Indiana 1995-1997

A manufacturer of hospital beds.

Industrial Engineer: Responsible for supporting new product development through training operators and designing manufacturing areas.

- Launched 5 new product lines in 18 months with new product development team.
- Hired, trained and supervised two (2) industrial engineers.
- Selected as Kaizen Team Leader to molded company culture into a team environment. **Net Result:** Reduced floor space by 50% and overhead by 25%.

Cummins Engine Company, Columbus, Indiana. 1995 - 1996 A manufacturer of diesel engines.

Plant Industrial Engineer: Responsible for streamlining plant operations.

- Integrated Lean Manufacturing Strategies and Kaizen Principles including time studies and simulation modeling (Pro Model) to develop standardize work
Net Result: Increased production by 20%.
- Developed hand on projects that fostered paradigm shift from traditional work force to a team base environment with hands on training on becoming a self managed team.
- Performed capacity analysis and optimized inventory. **Net Result:** Reduced inventory costs by 20%

Diploma, Montessori, Midwest Montessori Teacher Training for ages 3-6, and 6 to 9 (elementary)

Diploma, Greater Cincinnati Center for Montessori Education ages 0-3 years

STEM Certified Elementary teachers K to 6th, St. Catherine University, St. Paul MN MBA, Finance,

International Business, and New Venture & Business Development Kelley School of Business, Indiana University, Bloomington, Indiana, 2000

Bachelor of Science, Industrial Engineering, North Carolina A&T State University, Greensboro, North Carolina, 1994

SABA – NA’IMAH BERHANE

SUMMARY

I graduated May 2015 and have been working with K12 (Hoosier Academy) ever since. I take great pride in merging my love of teaching and graphic design to create fun and functional designs to engage our virtual learners! I was also a K12 student myself so I have a lot of insight into the world of virtual learning.

AREAS OF HIGHLY QUALIFIED LICENSURE

K-6 ELEMENTARY GENERALIST

Expires: 2/2/2020

5-9 MATHEMATICS

Expires: 2/2/2020

LICENSE #: 10163066

SKILLS

Suites: Microsoft Office (i.e. Word, Excel, PowerPoint) , Adobe Creative (i.e. Photoshop, Illustrator, Flash), Blackboard(i.e. Collaborate, Plan)
Also: Interpersonal Communication, Graphic Design/Digital Art

WORK HISTORY

LEAD TEACHER & CURRICULUM DEVELOPER, GIRLS STEM INSTITUTE, INDIANAPOLIS, IN

June-July (recurring summer camp)

HS MATH TEACHER, HOOSIER ACADEMY VIRTUAL SCHOOL, INDIANAPOLIS, IN

August 2015 – July 2018

Algebra 1, ECA Prep/Lab

STUDENT TEACHER, MSD LAWRENCE TOWNSHIP, 6 - 8TH GRADES, INDIANAPOLIS, IN

August 2014 – May 2015

General Ed 6th, Algebra 7-8th

EDUCATION

BACHELORS OF SCIENCE IN ELEMENTARY EDUCATION & MIDDLE SCHOOL MATH

Indiana University – Purdue University Indianapolis

2015

REFERENCES

LINDSAY WESLEY

K12 Instructional Coach
lwesley@k12.com 269-599-2393

DR. CRYSTAL H. MORTON

Founder and Director Girls STEM Institute
cranhill@iupui.edu 317-274-2732

JONATHAN KROENKE

8002 States Bend Dr, Indianapolis, IN 46239 | C: 3174745751 | Jkroenke@uemail.iu.edu

Education

Bachelor of Science: Accounting/Finance

Indiana University, Kelley School of Business

GPA: 3.31/4.00

2014

Indianapolis, IN, United States

Experience

Staff Accountant

Availity, LLC

7/2018 to Current

Indianapolis, IN

- Enthusiastically helped create and define new invoicing process after company switched to new accounting software (Zuora).
- Managed the collection and creation of over 3,000 invoices a month, while working with database and system analysts to automate the process for increased speed and efficiency.
- Revised and streamlined inefficient manual processes and increased automation.
- Created a whole new set of process documents for new accounting software.
- Prepared and processed payment of sales tax.
- Performed monthly account reconciliations.
- Helped catch-up old account reconciliations that were not performed during the software transition.
- Worked with Database teams to automate the usage load into new company software saving 15+ hours a month of work for the Accounting team.
- Performed monthly analysis of actual revenue vs budgeted revenue.

Staff Accountant – Technology

The Schneider Corporation – Geospatial (Reorganization occurred)

1/2018 to 7/2018

Indianapolis, IN

- Perform month-end billing process in order to generate client invoices. This process includes:
 - Working with project managers (PMs) to adjust any time that is allocable to a project that was originally entered as unallocated
 - Generating preliminary bills for PM review and comments
 - Generating draft invoices for PM review based upon preliminary billing comments
 - Finalizing and posting invoicing to the general ledger
 - Sending out monthly invoicing with any supplemental detail to clients
 - Making sure sales orders were setup with the correct billing items and billing addresses.
- Respond to client billing issues/needs as they occur.
- Worked with PMs on collection efforts for any accounts with past due balances by contacting clients and inquiring about status of payment.
- Prepared weekly AR analysis report for PM's and Management.
- Entered month-end journal entries and assisted with the creation of month-end reconciliations.
- Generated a monthly technology financial review for revenue including recurring and non-recurring revenue – managed to cut this process down by 180 manual journal entries and 2 days of work dedicated work.
- Implemented the change from sending out paper mail to emailing invoices to our clients to expedite cash collections.
- Corrected errors in monthly, quarterly and annual revenue recognition.
- Documented any collection/payment issues that occurred and how to correct these issues.
- Helped create documentation for AR and AP processes that were lost in the restructuring.
- Charged expenses to accounts and cost centers by analyzing invoice/expense reports; recording entries.
- Ensured timely payment of vendors through ACH and check.
- Conducted monthly bank reconciliation on our operating account and subscription account.
- Created process new process to update billing address's on the customer record, the sales order and the invoice using a CSV upload.

Staff Accountant

The Schneider Corporation

04/2017 to 12/2017

Indianapolis, IN

- Collaborated with accounting team and engineering team to enhance the billing process.
- Perform month-end billing process in order to generate client invoices. This process includes:

- Working with project managers (PMs) to adjust any time that is allocable to a project that was originally entered as unallocated
 - Generating preliminary bills for PM review and comments
 - Generating draft invoices for PM review based upon preliminary billing comments
 - Finalizing and posting invoicing to the general ledger
 - Sending out monthly invoicing with any supplemental detail to clients
- Held oversight over the creation of invoices for the project managers in the engineering department.
- Performed collections on aged receivables.
- Utilized my connections with the accounting team and the engineering team to help expedite the payment of aged invoices.
- Managed the collection of documentation from 20+ project manager's to create weekly and monthly invoices.
- Helped track the efficiency of labor on individual projects.
- Applied cash to open invoices.
- Entered month-end journal entries and assisted with the creation of month-end reconciliations.

**Staff Accountant - Marketing and International
Steak 'N Shake**

**08/2015 to 12/2016
Indianapolis, IN**

- Collaborated with accounting team to create better internal processes and controls.
- Created monthly journal entries and accruals for Major Marketing and International accounts.
- Helped reconstruct financial statements through the process of a calendar change from 13 periods to 12 periods.
- Performed quarterly Reconciliations on major Marketing and International accounts.
- Collaborated with the marketing team to create and update the year to date budget and forecast analysis. Helped update this process and create functional excel spreadsheets for the marketing team to utilize through the calendar change.
- Held oversight over Outdoor and Print database. Utilized access to make tracking the budget more efficient in these two areas.
- Collaborated with Marketing department to help maintain an up to date and correct Marketing budget

**Accounting Specialist
Toyota Industrial Equipment Manufacturing**

**03/2015 to 05/2015
Indianapolis, IN**

- Collaborated with the accounting team to help create better internal controls.
- Worked with SAP to create queries, pay invoices, keep track of payables, and reconcile the Goods Receipt Invoice Receipt account.
- Worked through year end utilizing SAP and AS400 to help supply the team and the auditors with the correct documentation need to finish year end closing and audit procedures.
- Collaborated with the heads of multiple departments including, production, purchasing, and sales to reconcile why invoices were not yet paid.
- Helped team members utilize more advanced functions of excel like sharing documents, VLOOKUP's, macros, and enabling iterative calculations to make work more efficient.
- Created a process and documentation to standardize the collection of year end documents and audit documents as well as standardized the GRIR reconciliation process and documentation.

**Audit Intern
BKD CPA's and Advisors**

**01/2014 to 04/2014
Indianapolis, IN**

- Investigated and resolved discrepancies in monthly bank accounts while under tight deadlines.
- Collaborated extensively with auditors during preliminary and year-end audit processes.
- Aligned all financial activity with the regulations of the GAAP.
- Analyzed costs and revenues to project future trends
- Performed debit, credit and total accounts on computer spreadsheets/databases, using specialized accounting software.
- Performed field audits on wide variety of clientele using Prosystems FX.
- Created Accounting Flow Charts through excel to record the process for next year's audit.

Skills

- Advanced User in Zuora, Sales Force, Net Suite, Excel, Access, Office software package, Adobe PDF Reader.
 - Proficient in Deltek Vision, Oracle PeopleSoft, Imagenow and Syncplicity.
 - Familiar with AS400 and SAP.
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Biography

Joy P. Rees

1615 NORTH CENTENNIAL STREET
INDIANAPOLIS, INDIANA 46222
(765) 603-3995
JOYPREES@GMAIL.COM

[JR]

I am Joy P. Rees; I am a graduate of Ball State University with my bachelors' degree with an emphasis Early Childhood Education and Business. I plan to begin my AMI Montessori training in the Summer of 2019. I am currently a Montessori Educator in the Indianapolis Area. I enjoy working with people, especially children. I have great interpersonal skills and I am able to work and relate with all different types of personalities including difficult ones. Through my experiences I have gained skills that will allow me to provide co-workers, families, and students with the resources that they need.

Education Experience

Maria Montessori International Academy

November 2018 - Present

COO My responsibilities included: support operations of school, lead, manage, and hold educator accountable, keep all members of the organizations on the same page, collaborate with the president and CEO on her vision for the school.

Lead Teacher. My responsibilities included: providing a child-centered Montessori education, building relationships with students and families, lesson planning, redirection, diapering, potty training, simple meal preparation, conflict resolution, observation, necessary documentation, and basic cleaning.

Muncie Area Youth For Christ

May 2015 - August 2016

Campus Life Director. My responsibilities included: building relationships with students, building relationships with community members, hosting weekly and quarterly events for students to have fun, build relationships with their classmates, and Christ.

Apple Tree YMCA Child Development Center

December 2014 – May 2015

Assistant Teacher. My responsibilities included: behavioral guidance, diapering, potty training, simple meal preparation, conflict resolution, observation, necessary documentation, and basic cleaning.

Child Study Center – Ball State University

January 2015 – April 2015

Student Assistant. My responsibilities included: implementation of developmentally appropriate practices set forth by the National Association for the Education of Young Children, behavioral guidance, diapering, potty training, simple meal preparation, conflict resolution, observation, necessary documentation, and basic cleaning.

River of Life Preschool and Daycare

April 2014 – December 2015

Practicum Student. My responsibilities included: supervising children, helping children with class work as well as arts and crafts, basic cleaning, planning and conducting lessons, observation, and performing a child case study.

Teacher. My responsibilities included: lesson planning, conducting lessons, behavioral guidance, diapering, potty training, simple meal preparation, monitoring school age children, conflict resolution, putting children to sleep, observation, necessary documentation, and basic cleaning.

Teddy Bear Childcare Center

April 2013 – July 2013

Assistant Teacher. My daily responsibilities included: supervising children in free play, helping children to use art crafts and materials during the day, watching school age children, creating lesson plans, and helping the children with homework, setting out snacks and meals, as well as cleaning tables, floors, and learning areas.

Children's House Montessori Academy

July 2012 – April 2013

Teacher's Aide. My daily responsibilities included: helping children as they choose supplies in the classroom to learn from; helping learn Spanish, Sign Language, letter sounds, writing and reading; sweeping, wiping tables, washing dishes and mopping; tending to all needs of the children and interacting with the parents of each child.

Other Experience

Elite Dental Partners

December 2017 - November 2018

Office Manager. My responsibilities included: confirming that we are ready for the next day's patients, confirmation calls, insurance verification, performing consultations, completion of daily reports, answering incoming phone calls, checking patients in upon arrival, working reports that could provide our office with more revenue, performing end of month, taking cash deposits to the bank and the management of those who work on the clinical and administrative staff. This includes but is not limited to the management of wages, office supply budgets, achieving monthly goals, adjustments or write offs, and handling of accounts that have balances due.

Aspen Dental

November 2016 - December 2017

Office Manager. My responsibilities included: pulling charts for upcoming appointments, auditing charts, preparing dentures and partials to be shipped, confirming that we are ready for the next day's patients, confirmation calls, insurance verification, performing consultations when the office manager is unable, answering incoming phone calls, checking patients in upon arrival, verifying that we have all of the dental cases for the next business day, filing charts, working reports that could provide our office with more revenue, and performing end of day so that deposit can be taken to the bank as well as the management of those who work on the clinical and administrative staff. This includes but is not limited to the management of wages, office supply budgets, adjustments or write offs, and handling of accounts that have balances due.

August 2016 - Present

PSR/Office Manager Assistant. My responsibilities included: pulling charts for upcoming appointments, auditing charts, preparing dentures and partials to be shipped, confirming that we are ready for the next day's patients, confirmation calls, insurance verification, performing consultations when the office manager is unable, answering incoming phone calls, checking patients in upon arrival, verifying that we have all of the dental cases for the next business day, filing charts, working reports that could provide our office with more revenue, and performing end of day so that deposit can be taken to the bank.

Muncie Area Youth For Christ

May 2015 - August 2016

Campus Life Director. My responsibilities included: building relationships with students, building

relationships with community members, hosting weekly and quarterly events for students to have fun, build relationships with their classmates, and Christ.

Victory Honda of Muncie

October 2015 – August 2016

Business Development. My responsibilities included: receiving inbound calls from current sales customers and prospects, sending emails to current sales customers and prospects, setting sales appointments, and assisting in planning as well as hosting sales events.

Toyota of Muncie

May 2015 – October 2015

Business Development Manager. My responsibilities included: performing sales and service calls in relation to follow up as well as prospecting new customers, emailing customers, sending out email blast to large volumes of customers, setting sales appointments. Preparing for sales events, hosting sales events, conducting communication between vendors and Toyota of Muncie specifically the CRM Company.

J&L Marketing

December 2014 – May 2015

Promotion Coordinator. My responsibilities included: making contact calls with general managers and sales managers, preparing for a morning meeting, conducting a morning meeting, promoting and using social media to promote J&L Marketing, working with sales people, motivating sales people, using an electronic survey system, retaining information about vehicles, and working with customers.

Wal-Mart

July 2013 to October 2014

Sales Associate. My daily responsibilities include: down stacking palettes, putting freight on carts, putting freights on palettes, stacking freight that will not go on the shelf on a cart then onto a palette, running old freight that would not go on the shelf awhile ago and checking if it would go at a later date, occasionally binning old freight, taking my trash from each night and getting rid of it, claiming freight that cannot be sold, and bringing all the freight on the shelf forward before the night is over.

Bob Evans

February 2012 to July 2012

Server. My responsibilities were to take orders, put them in the computer, serve food and drink, clear tables, wipe tables, stock condiments on tables, and sweep the floor.

Subway

July 2011 to November 2011

Sandwich Artist. My responsibilities were to chop vegetables, bake bread, stock freezer and fridge, stock sandwich making area, sweep, mop, wash dishes, take out trash, and run the cash register.

McDonald's

March 2009 to July 2011

&

July 2013 to May 2014

Crew. My responsibilities are to take orders, run the cash register, prepare food, deliver food, sweep and mop, wipe tables and wash dishes and equipment.

Volunteer Experience

Muncie Area Youth For Christ

May 2013 - Present

Adult Leader. My responsibilities included: building relationships with students, building relationships with community members, assisting with weekly and quarterly events for students to have fun, build relationships with their classmates, and Christ.

The Gathering

May 2013 – June 2014

Sunday School Teacher (Volunteer). My responsibilities are to teach the children a bible story, play with the children, encourage the children during worship time, lead the children in a craft activity, care for children's basic needs, as well as clean up at the end of the service.

Worship Leader (Volunteer). My responsibilities include coming up with songs to sing with the children, each song must have motions that I create for the children to do while singing, tell the children the bible story, and find a way to communicate the bottom line, theme, and memory verse for the month.

God's House

August 2008 – September 2012

Sunday School Teacher (Volunteer). My responsibilities were to plan a lesson for thirty to forty 3rd through 5th grade students, organize volunteers and delegate responsibilities, run the classroom for 2 hours each Sunday Morning.

Volunteer at the Center for Success (Volunteer). My responsibilities were to be at the Center and work with students on homework, crafts, and outdoor activities.

Intern (Volunteer). My responsibilities were to plan and execute activities at the Center for Success with three other interns, attend bible study weekly, plan a fundraising event, and give a sermon.

Education

Marion High School

August 2007 to June 2011

Received an Honors Diploma.

Ivy Tech Community College

January 2013 to May 2014

Received an Associates' Degree in Early Childhood Education.

Ball State University

August 2014 to May 2015

Bachelors' Degree with emphasis Early Childhood Education and Business.

References

Laura Reiter

2012 - Present

Teacher. Marion, Indiana. (765) 506-2338

Angie StJohn

2013 - Present

Accountant. Muncie, Indiana. (765) 749-4687

Baylea Holdcroft Office Manager. Muncie, Indiana. (765) 717-9651	2016 - Present
Dr. Leslie Bryant Dentist. Fishers, Indiana. (409) 990-0125	2016 - Present
Dr. Rachana Waghela Dentist. Carmel, Indiana. (816) 838-7639	2016 - Present



Professional Summary

Deeply motivated and reliable Montessori Teacher with a stellar record of classroom and administrative achievement. Able to function well independently and as a member of a Montessori education team. Strong ability to coordinate with parents and guardians as well as other Montessori teachers and school staff.

Core Qualifications

- Exceptional skill and experience with the Montessori education model and facilities
- Strong knowledge of multicultural education.
- Thorough grasp of Montessori curriculum design and development
- Outstanding facility with child development activities and practices
- Superior classroom management skills
- High oral and written communication skills

Experience

Slyvan Learning Center, Indianapolis, IN

Tutor, Kindergarten to High School, 1999 - 2017

- Adapt teaching and learning tools to student's varying needs
- Tutor all of reading and math, including High school math and science
- Tailored, Monitored and records students performances

Montessori Teacher, Kindergarten and 1st to 3rd, 8/1/2010 – Present

Maria Montessori International Academy, Indianapolis IN

- Strongly demonstrated continuous professional development.
- Acquired thorough knowledge of all classroom subject matter.
- Tailored individually appropriate instructional techniques to meet student needs.
- Created comfortable and stimulating classroom environment.
- Supported achievement of classroom and institution goals.
- Participated in PDP (Professional Development Process) to assess personal instructional effectiveness.

Laura Burger

6184 West 100 North, Anderson, IN 46011

Montessori Teacher Kindergarten. 6/1/2004 – 8/1/2010

International Montessori School, Indianapolis, IN

- Conducted research in best classroom practices and strategies.
- Developed appropriate lesson plans and assessment methods.
- Fostered student reasoning and problem-solving skills.
- Performed regular coordination with families in support of student learning processes.
- Facilitated positive relationships between students and with other teachers and staff.
- Assessed learning outcomes in multiple aspects on a regular basis.

Montessori Teacher Kindergarten 6/1/2004 – 8/1/2010

Community Montessori School Indianapolis, I

Teacher Assistant 2001

Lead Teacher 2002-2004

Education

Master In Montessori, Loyola University, Maryland, 2001

Associate Internationale Montessori 2001

B.S. Elementary with Kindergarten endorse, 1998

Indiana State License K to 6th grade



Professional Summary

Deeply motivated and reliable Montessori Teacher with a stellar record of classroom and administrative achievement. Able to function well independently and as a member of a Montessori education team. Strong ability to coordinate with parents and guardians as well as other Montessori teachers and school staff.

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Maria Montessori International Academy, Indianapolis IN

Montessori Teacher, Kindergarten and 1st to 3rd, 8/1/2010 – Present

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B.S. Elementary with Kindergarten endorse, 1998

Indiana State License K to 6th grade

JAMES MILETELLO

3316 N. Keystone, Unit C ▪ Chicago, IL 60641 ▪ (312) 860-2376 ▪ newbuleria@gmail.com

VISIONARY NON-PROFIT LEADERSHIP & MANAGEMENT

Well-rounded and energetic professional with over 15 years of diverse experience seeks new challenge and opportunity to apply skills in non-profit leadership and management.

◆ KEY AREAS OF EXPERTISE ◆

- | | | |
|------------------------|--------------------------|-----------------------------|
| ▪ Program Development | ▪ Fundraising | ▪ Mind/Body Practices |
| ▪ Strategic Planning | ▪ Information Technology | ▪ Performance Psychology |
| ▪ Grant Writing | ▪ Graphics/Web/Video | ▪ Philosophy & Spirituality |
| ▪ Operations & Finance | ▪ Event Coordination | ▪ Music & Dance |

PROFESSIONAL PROFILE

- **Grant Writing & Grants Management.** Over \$50 million raised in grants • Adept at leveraging new and existing foundation and government RFP opportunities • Seasoned grants manager with proven ability to meet program objectives and honor compliance requirements.
- **Organizational Development & Capacity Building.** Results-driven leader with a commitment to inciting organizational change • Skilled at finding creative methods to improve fundraising endeavors, marketing and graphic design, information technology, finance, and other key operational areas.
- **Strategic Planning.** Able to escalate organization growth through strategic planning, program development, and administrative support • Business planner with proven ability to maximize productivity and revenue.
- **Budget Management.** Strong experience in developing expense and revenue projections in addition to creating program and organizational budgets • Designed financial protocols to control costs.
- **Team Leadership.** Able to provide leadership and supervision in both small and large team environments.
- **Communications Ability.** Strong writing skills across a variety of media • Proficient in basic/intermediate Spanish • Able to engage with stakeholders of all levels.
- **Problem Solving Capacity.** Self-driven individual with a strong autodidactic orientation • Willing and able to work “beyond the job description” in pursuit of professional goals • Able to synthesize information and create strategies which help re-frame the notion of “problem and solution.”
- **Graphic, Video, & Web Design Experiences.** Self-taught graphic, video, and web designer with broad skillset and abilities in Adobe Creative Suite and other software • Able to identify options which help both small and large organizations develop a more “mature” visual presence and refine message/branding.
- **Lifelong Student of the Human Mind and Spirit.** Practitioner of several mind/body disciplines • Use of personal experiences in music, the arts, philosophy, spirituality, and dance to inform current and prospective research ideas which provide opportunities for one to maximize the potential for self-actualization.
- **Passionate Visionary.** Driven by a belief that by changing oneself, one can then help change the world.

EMPLOYMENT HIGHLIGHTS

Self-Employed Non-profit Consultant - Chicago, IL
Organization Consultant

June 2017 – Present

- Helped advance the mission and work of 20 organizations around the country through grant writing, graphic design, strategy, program planning, and other consulting needs. Sectors include organizing, education, mentoring, culinary arts, mind/body practices, health, medicine, literacy, refugees, housing, and farming.

Latin United Community Housing Association (LUCHA) • Chicago, IL**June 2013 – June 2017***Director of Development & Fundraising*

- Drafted grant proposals/applications in support of a diverse programming portfolio (e.g. Homebuyer Preparation, Foreclosure Mitigation, Transitional Housing, Building Development, Community Home Improvements, and Legal Services) which led to over \$12 Million in funding from June 2013 – June 2017.
- Conceptualized and secured funding to launch several new programmatic initiatives at LUCHA, including The LUCHA Law Project (\$225,000), The Home Weatherization Program (\$1 Million), The Flood Repair Program (\$350,000), The Property Tax Rebate Initiative (\$30,000), the CHA Housing Choice Voucher program (\$50,000), and The Health/Wellness Community Initiative (\$110,000).
- Facilitated LUCHA's obtaining of government approval as a Community Housing Development Organization (CHDO) and as a HUD Housing Counseling Agency.
- Conceptualized and organized an annual fundraiser – The LUCHA Masquerade - and generated \$150,000 over three years.
- Contributed to the budgeting and financial management process by proposing solutions to revenue challenges, expense management, and financial projections.
- Provided oversight and supervision for grant awards, programs, vouchering, and other compliance obligations.
- Facilitated several upgrades and enhancements to organization's information technology structure, including a VOIP telephone system, an email platform, a phone dialer, the initial launch of a renter's tenant portal, and a CRM designed to manage LUCHA's grant solicitation efforts.
- Conceptualized and co-facilitated a three-month human resources project which led to the development of new employee job descriptions.
- Conceptualized and co-facilitated a six-month key messaging and branding initiative which led to the development of a new logo, a copy and style guide, and a forthcoming new website and rebranding efforts.
- Designed all graphic, web, marketing, and outreach materials using Adobe Creative Suite and other products.

The Najera Consulting Group • Hinsdale, IL**May 2010 – April 2012; October 2012 – April 2013***Strategic Planning Consultant*

- Provided strategic & business planning consultations to Chicago and National non-profit organizations.
- Worked with Firm President to improve organization's capacity to provide client services, including designing new templates and client tools, a revised client engagement process, and enhanced strategic offerings.
- Co-facilitated strategy planning sessions with respect to programming, theories of change, and management.
- Conducted environmental scans and drafted strategy documents, program logic models, and other materials.

The North Lawndale Employment Network • Chicago, IL**May 2012 – October 2012***Director of Development*

- Performed grant writing services for programs serving the formerly-incarcerated.
- Drafted grant reports for existing funders and helped maintain funder compliance.
- Provided executive and governance support to Executive Director and two Boards of Directors.

ACE Tech Charter High School • Chicago, IL**October 2006 – May 2010***Director of Development & Evaluation*

- Contributed to securing and managing Chicago Public Schools contracts to support \$6 Million annual budget.
- Generated over \$3.5 Million in new grants and contract revenue over four years.
- Generated \$600,000 in gala pledges over four years.
- Drafted initial charter renewal application in 2010.
- Designed format, protocol, and training programs for after-school programs.

ADDITIONAL WORK HISTORY

- **The Miletello Consulting Group:** Non-Profit Consultant ▪ Chicago, IL **September 2005 – October 2006**
- **American Language School:** ESL Instructor ▪ Sanbon, South Korea **July 2004– August 2005**
- **Onward Neighborhood House:** Development Assistant ▪ Chicago, IL **September 2003 – July 2004**
- **Nye & Associates:** Paralegal ▪ Chicago, IL **March 2002 – July 2003**
- **Lassiter & Associates:** Bookkeeper/Paralegal ▪ Jacksonville, FL **October 2000 – January 2002**
- **Stein Mart Corporate Offices:** Assistant Buyer ▪ Jacksonville, FL **September 1999 – September 2000**
- **Fred Astaire Studios:** Ballroom Dance Instructor ▪ Jacksonville, FL **September 1997 – September 1999**

COMMUNITY INVOLVEMENT

The Social Alchemy Collective ▪ Chicago, IL
Founder

May 2016 – Present

- Conceptualized and founded The Social Alchemy Collective: A non-profit think tank and action team comprised of individuals who represent various sectors, interests, professions, ideologies, and aspirations and are committed to the facilitation of social change and holistic human development.
- Recruited a founding board and began planning for long-term board and staff composition needs.
- Convened team of local and remote contractors to facilitate organization objectives.
- Launched current initiatives around social innovation, non-profit and grant writing consulting, organization growth and development, mind/body practices, urban farming, micro brewing, and social enterprises.

Avondale Montessori Academy ▪ Chicago, IL
(now known as The Montessori School of Englewood)

March 2009 – April 2010

Volunteer Design Team Member

- Helped draft initial new school design framework and proposal.
- Assisted Executive Director with outreach, engagement, and project management/execution.
- Helped create incubation and five-year budgets with corresponding fundraising plan.

EDUCATION

▪ **Grand Canyon University**
 Doctor of Philosophy in Performance Psychology

Completion Date: April 2019

Dissertation Topic: The Magic of Mastery: A Case Study Examining Participant Response to Custom Graphic Novels and Videos Exploring Mastery Motivation, Religiosity, Meaning in Life, and Mindfulness.

▪ **Postgraduate Certificate in Philosophy**
 Lampeter Campus - University of Wales, Trinity Saint David

September 2009

▪ **Master of Science in Human Services - Emphasis in Non-Profit Management**
 Capella University

August 2005

▪ **Bachelor of Science in Psychology - Minor in Business**
 Excelsior College

May 2003

OTHER SKILLS & INTERESTS

- **Software:** Expertise with software programs such as Microsoft Office, QuickBooks, and Adobe Creative Suite.
- **Mind/Body Practices:** Practitioner of various forms of yoga, bagua, qi gong, and other “movement” systems.

Attachments 2-4

Contains Academic Information

MAPS Curriculum Sequence/Scope

Mathematics, K-5: Students will use a range of Montessori materials to explore concepts extensively in concrete form before abstracting and integrating them. Montessori curriculum addresses a large majority of the Mathematics objectives in the IN Curriculum Frameworks. Number Sense and Operations, and Geometry receive especially strong and effective emphasis in the Montessori curriculum. Topics such as problem solving and measurement will be further developed during the first years of the school's operation to address the state standards more effectively.

Language Arts K-5: The Montessori curriculum stresses the interrelatedness of reading and writing and promotes an integrated approach where reading and writing occur across the curriculum. Phonemic awareness, direct instruction in phonics, grammar, and vocabulary development are essential components of the curriculum, as well as developing fluency and comprehension skills. ISTEP requires strong competencies in the development of expository essays and comprehension of diverse types of reading material. As a result, topics for further development include expository writing and writing process, guided reading with non-fiction texts, comparison between texts, interpreting and using media for communication, and genre, author, and illustrator studies.

Science and Social Sciences K-5: During every level of MAPS education, students will interact with Montessori's Five Great Lessons with increasing depth. These lessons form the backbone of the History and Social Sciences and Science and Technology curricula. They are broadly engaging stories that highlight universal themes and encourage vital connections between science and human affairs. These lessons are The Story of the Universe, The Time Line of Life, The Time Line of Early Humans, The Story of Writing, and The Story of Mathematics. They serve to integrate and unify classroom-learning experiences and to inspire children's sense of wonder, curiosity, and motivation about the world around them. Montessori teacher-led lessons and demonstrations inspire careful observation and experimentation and provide opportunities for student-driven inquiry.

MAPS science and social science investigations are framed by essential questions that relate to Montessori's Five Great Lessons ("Do all things change?" or "What makes us human?" for example.) These questions serve as a guiding frame for integrated, thematic studies, individual research projects, and service learning activities. Over several years, teachers will draw from published resources, gather relevant artifacts and resources, and work collaboratively to develop more in-depth lessons and projects for a series of science and history inquiry kits. Students will apply and extend their skills and understandings in the Middle School through relevant project-based endeavors (for example, collecting water quality data over time, analyzing trends, and reporting findings).

Foreign Language, K-5: The goal of MAPS is that all of its students should read, write, and converse in at least one language in addition to English. Thus, it will begin foreign language instruction begin in Kindergarten. All MAPS students will receive two periods of Spanish instruction per week, integrating oral language games, songs, and activities, bilingual picture books, and introduction to written language. In addition, this instruction will serve to acknowledge the diversity in our community and provide a tool to encourage cultural understanding.

Technology and the Arts, K-5: The visual and performing arts will be an integral part of the curriculum at MAPS. Both will provide significant access points for student understanding, opportunities for expression and creativity, and ongoing learning about diverse perspectives on the world. Meaningful arts

experiences will be integrated into every classroom as activities of choice and exploration during self-directed learning and will be enriched through specific instruction and projects once per week with arts specialists. Computers with internet and email access will be integrated into the teaching and learning of every classroom. In addition, a smaller lab space will be available for student and teacher projects. Educational software, internet access, graphic and publishing capabilities, telephones, email, digital cameras, and scanners will be available for furthering students' skill development, research in larger communities, service learning contributions, and demonstrations of learning.

Health and Conflict Resolution Education, K-5: MAPS will be committed to the development of the whole child, therefore physical and health education, are significant components of the curriculum. Children will enjoy at least one full period every day of socially based physical activity in the form of recess. In addition, students will engage in more directed physical play and development twice per week under the direction of a physical education specialist. In the Lower Elementary, students will also learn about body systems, social pressures, and human health and illness through theme-based studies and self-directed research within the classroom. In the Upper Elementary, students will learn about human growth and development, reproduction, and sexuality, as well as substance use and abuse. Conflict resolution skills are core to the school's learning objectives and will be taught and supported explicitly at each grade level.

Examples of Benchmarks/Alignments for Three Core Curricular Areas (LA, Math, and Science) and One MAPS-Specific Goal (Social Achievement)

ENGLISH/LANGUAGE ARTS, LOWER ELEMENTARY

Sample Achievement Goal: “I can read and understand a non-fiction passage for the third-grade level.”

Achievement Criteria: I have demonstrated achievement of this goal when I can read aloud a non-fiction passage (provided by my teacher) fluently and with 85% accuracy, retell 85% of the key information either orally, within a graphic organizer, or in writing, according to a scoring sheet used by my teacher, and correctly answer 85% of a set of questions about the reading, asked by my teacher. These questions will ask about vocabulary, details and main ideas in the reading, predictions, and ideas suggested in the reading, the organization of the text, as well as the graphics and headings.

IN Curriculum Frameworks: ELA Standards 4.5, 4.11, 4.13, 4.14, 7.5, 7.6, 7.7, 7.8, 7.9, 7.10, 8.9, 8.10, 8.15, 8.16, 8.17, 8.18, 13.6, 13.7, 13.9, 13.10, 13.11, 13.12

ENGLISH/LANGUAGE ARTS, UPPER ELEMENTARY

Sample Achievement Goal: “I know how to write a two-page comparative review of a story that is available in book and movie form, and make well-supported recommendations to readers for either reading or viewing the story, for publication in a school or community newsletter/paper.”

Achievement Criteria: I have demonstrated achievement of this goal when I have submitted a graphic organizer or planner detailing my intended main points and supporting evidence, 1-2 drafts with colored pencil revisions and edits showing specific improvements in the development of the text, written feedback on drafts from two older readers with my own notes concerning which aspects I will address in the final version, a proficient or advanced score on the scoring rubric completed by my teacher, a self-reflection/assessment sheet about my writing process and progress, and a copy of the final publication.

IN Curriculum Frameworks: ELA Standards 17.4, 17.6, 19.22, 19.23, 20.4, 21.6, 21.7, 22.8, 23.10, 23.11, 24.4, 25.3, 26.2

MATHEMATICS, LOWER ELEMENTARY

Sample Achievement Goal: “I can create and correctly solve six different 1- or 2-step story problems involving multi-digit addition or subtraction, make appropriate estimations, communicate my problem-solving strategies, including standard notation, and explain how I know my answer makes sense.”

Achievement Criteria: I have demonstrated achievement of this goal when I can independently write or dictate three multi-digit addition and three multi-digit subtraction story problems that use regrouping. For each problem, I must record an estimated answer and the strategy I used for estimation, demonstrate the solution through use of math materials, record efficient strategies for solving each problem using words, pictures, and numbers, arrive at correct solutions, and explain how I know the answers make sense.

MATHEMATICS, UPPER ELEMENTARY

Sample Achievement Goal: “I can create a scale model of an historical building in my city for temporary display in a public building in city.”

Achievement Criteria: I have demonstrated achievement of this goal when I have collected measurements of the actual building, drawn a scaled diagram of the building, noting actual and scaled measurements of length, width, height, perimeter, and area in a chart, created an oaktag or cardboard model of the building, researched and written a .5-1 page historical description of the building, citing sources, and made arrangements for the temporary display of my project in a public building in town.

IN Curriculum Frameworks: Mathematics 4.M.2, 4.M.4, 4.M.5, 6.M.1, 6.M.3, 6.M.6, 4.D.1

SCIENCE, LOWER ELEMENTARY

Sample Achievement Goal: “I can investigate questions in science by recording my questions, predictions, observations, experiments, data and learning in a science journal.”

Achievement Criteria: I have demonstrated achievement of this goal when I can use a science journal to record questions and “wonderings” about a science topic I am studying, create detailed and labeled observational drawings of organisms and/or artifacts related to this topic, record the design and materials needed for an experiment I want to try, clearly record data and/or results from the experiment, make notes about the patterns I see in the results, and write about what I understand about the topic after I have completed the experiment or observation.

IN Curriculum Frameworks: Science & Technology, Strand 1, Inquiry

SCIENCE, UPPER ELEMENTARY

Sample Achievement Goal: “I can demonstrate why the moon goes through different phases.”

Achievement Criteria: I have demonstrated achievement of this goal when I have created a moon observation journal, recording sky observations and questions and the date, time, and visible parts of the moon for one month; have experimented with three-dimensional models in the classroom to replicate the moon phases; and can demonstrate and verbally explain to a peer in the Upper Elementary program why the moon changes phases. My presentation must explain concepts of waxing and waning moons, revolution and rotation, eclipses, and the predictable, cyclical nature of moon phases.

IN Curriculum Frameworks: Science & Technology, Strand 1, Inquiry; Strand 2, Physical Sciences, Position and Motion of Objects, Forms of Energy, Properties and Changes of Earth’s Materials, Objects in the Sky.

SOCIAL ACHIEVEMENT, UPPER ELEMENTARY

Sample Achievement Goal: “*I know how to apply conflict resolution skills to help others solve conflicts peacefully and productively.*”

Achievement Criteria: I have demonstrated achievement of this goal when I have recorded three videotapes (taken by a peer, volunteer, assistant, or guest) of my serving as a peer-mediator for children in the Lower Elementary program that illustrate how my use of conflict resolution skills helped younger students solve their conflicts. I will be observed by a teacher as I review the videotaped segment with the involved students and point out and discuss with them the conflict resolution strategies I used to help them and as I ask them for feedback on whether they felt my mediation was useful to them.

IN Curriculum Frameworks: ELA 1.1 1.3, 3.8, 3.11

Curriculum and Assessment Development Plan

MAPS Curriculum and Assessment Handbooks	Benchmark Portfolio Expectations	Core Classroom-based Assessment
<ul style="list-style-type: none"> • Alignment chart of IN Frameworks, Common Core, Montessori, and MAPS Learning Objectives. • Create Handbooks 	<ul style="list-style-type: none"> • Create Expectations 	<ul style="list-style-type: none"> • Draft practices and tools
<ul style="list-style-type: none"> • Teachers review and refine Handbooks. 	<ul style="list-style-type: none"> • Teachers review and refine Expectations • Collect student samples to show different proficiency levels. 	<ul style="list-style-type: none"> • Teachers collect baseline data
<ul style="list-style-type: none"> • Curriculum/updates to handbooks. 	<ul style="list-style-type: none"> • Students complete benchmarks. 	<ul style="list-style-type: none"> • Teachers review and refine practices and tools. • Assessment training.

Sample Grade-Level Workplans

MAPS will adopt the workplan approach suggested by Montessori for All. The following are sample workplans that all of MAPS workplans will follow, as provided by Montessori for All.

Grade 1

September Workplan: Grade 1

Name: _____

Date: _____

Mathematics Activities:

___ Addition Tables (strip board)

2 3 4 5 6 7 8 9

___ Mult. Bead Board Tables

2 3 4 5 6 7 8 9 10

___ Snake Game - Search for Ten

___ Time Concepts Set 1

___ Money Concepts Set 1

___ Fractions Set 1

___ Place Value

___ Units Roman Numerals

___ Greater Than/Less Than

___ Cardinal/Ordinal Numbers

Social Studies Activities:

___ Parts of the Earth

___ Continent Map

___ Continent Objects

___ Location of Equator

___ Cardinal Directions N S E W

___ Calendar Work

___ Months & Seasons

Geometry Activities:

___ Fundamental Concepts (A1)

___ Geometry Stick Box

___ Triangle Box

___ Geometry Cabinet

circles rectangles

___ Geometric Solids/Labels

Language Arts Activities:

___ Initial Consonant Matching

___ Initial Vowel Sound Matching

___ Vowel Tree - short vowel words

___ Pink Series Objects Matching

___ Pink Series Pictures Matching

___ Pink Series Rhyming

___ Pink Series Word Lists

___ Pink Series Story w/Movable
Alphabet

___ Noun/Verb Presentation

___ Sight Words Set 1

Biology Activities:

___ Living/Non-Living

___ Parts of a Plant

___ Parts of a Root

___ Parts of a Fish

Art & Music:

___ Art Cards - Monet

___ Playing Rhythm Instruments

Choices:

October Workplan: Grade 1

Name: _____

Date: _____

Mathematics Activities:

___ Addition Strip Board

2 3 4 5 6 7 8 9

___ Mult. Bead Board Tables

2 3 4 5 6 7 8 9 10

___ Addition Facts

___ Time Concepts Set 2

___ Money Concepts Set 2

___ Fractions Set 2

___ Tens Roman Numerals

___ Exchange (Regrouping)

___ Negative Snake Game

Social Studies Activities:

___ Parts of a Volcano

___ Child's Own Continent

___ Introduction to World Globe

___ Land/Water Forms - Drawings

___ Days of the Week

___ Months of the Year

Geometry Activities:

___ Types of Lines (B1)

___ Parts of a Line (B2)

___ Rectangle Box

___ Geometry Cabinet

triangles polygons

___ Use of a Ruler

Language Arts Activities:

___ Sight Words Set 2

___ Pink Series Beginning Blends

___ Pink Series Ending Blends

___ Pink Series Vowel Sounds

___ Pink Series Word Cards

___ Animal Homes Set 1

___ Animal Sounds Set 1

___ Animal Young Set 1

Biology Activities:

___ Parts of a Flower

___ Parts of a Fruit

___ Parts of an Amphibian

___ Beginning Animal Research

Art & Music:

___ Art Cards - Van Gogh

___ Types of Musical Instruments

Choices:

**November & December
Workplan: Grade 1**

Name: _____

Date: _____

Mathematics Activities:

___ Addition Facts (flashcards,
Bingo Games)

___ Subtraction Strip Board

___ Golden Bead Equations

3 of each: + - x ÷

___ Write the word for each:

1 2 3 4 5 6 7 8 9 10 11 12

___ Division Bead Board

Find factors for:

12 10 18

___ Bead Chains

___ Triple Addends

___ Multiplication Layouts

2 3 4 5 6 7 8 9

___ Hundreds Roman Numerals

Social Studies Activities:

___ Europe Map

___ Europe Animals

___ Europe Plants

___ Europe Flags

___ Europe Places

___ Land and Water Forms Pictures

___ Past/Present/Future

___ Phases of the Moon

Geometry Activities:

___ Positions of a Line (B3)

___ Positions of Line Segments (B4)

___ Small Hexagon Box

___ Geometry Cabinet

quadrilaterals closed curves

Language Arts Activities:

___ The Noun Family

___ Articles with Objects

___ Sight Words Set 3

___ Common/Proper

___ Blue Series Blends Intro

___ Blue Series Rhyming

___ Blue Series Matching Cards

___ Synonyms Set 1

___ Matching Phrases Set 1

___ Contractions Set 1

___ Blue Series Story Writing
w/Movable Alphabet

Biology Activities:

___ Parts of a Stem

___ Parts of a Reptile

___ Animal Stories Set 1

___ Plant Stories Set 1

Art & Music:

___ Art Cards - Cassatt

___ World Instruments

Choices:

January Workplan: Grade 1

Name: _____

Date: _____

Mathematics Activities:

- ___ Addition Word Problems
- ___ Stamp Game 4-digit addition
- ___ Bead Bars - double digit +
- ___ Simple Graph Work
- ___ Balancing Equations
- ___ Small Bead Frame: static +

Social Studies Activities:

- ___ Antarctica Map/Labels
- ___ Antarctica Animals
- ___ Antarctica Flags
- ___ Antarctica Places
- ___ Antarctica Pictures
- ___ Types of Snow

Geometry Activities:

- ___ Positions of Two Straight Lines
(B5)
- ___ Parts of an Angle (C2)
- ___ Large Hexagon Box
- ___ Triangle Stars

Language Arts Activities:

- ___ Animal Sounds Set 3
- ___ Animal Young Set 3
- ___ Animal Homes Set 3
- ___ Alphabetizing Set 2
- ___ Singular & Plural Set 2
- ___ Study of the Verb
- ___ Creative Writing
- ___ Matching Phrases Set 2
- ___ Blue Series Ending Blends
- ___ Blue Series Beginning Blends
- ___ Blue Series Consonant Blend
Matching

Biology Activities:

- ___ Parts of a Mammal
- ___ Vertebrate Sorting
- ___ Carnivore/Herbivore/Omnivore

Art & Music:

- ___ Art Cards - Manet
- ___ Types of Musical Terms -
Beginning

Choices:

February Workplan: Grade 1

Name: _____

Date: _____

Mathematics Activities:

- ___ Subtraction Word Problems
- ___ Stamp Game 4-digit -
- ___ Bead Bars: double digit -
- ___ Simple Graph Work
- ___ Balancing Equations
- ___ Small Bead Frame: static -

Social Studies Activities:

- ___ South America Map
- ___ South America Animals
- ___ South American Plants
- ___ South America Flags
- ___ South America Places
- ___ South America Pictures
- ___ Types of Weather
- ___ Parts of a Train

Geometry Activities:

- ___ Parts of an Angle (C2)
- ___ Types of Angle Sizes (C3)

Language Arts Activities:

- ___ Alphabetizing Set 3
- ___ Singular & Plural Set 3
- ___ Compound Matching Cards 1
- ___ Creative Writing
- ___ Journal Writing

Biology Activities:

- ___ Parts of a Porifera
- ___ Food Chain
- ___ Nocturnal, Diurnal, Crepuscular

Art & Music:

- ___ Art Cards - Cassatt
- ___ Types of Musical Terms - Advanced

Choices:

March Workplan: Grade 1

Name: _____

Date: _____

Mathematics Activities:

___ Addition Pizza Wheels

2 3 4 5 6 7 8 9

___ Small Bead Frame: dynamic +

___ Subtraction Strip Board:

Analysis of Number

___ Subtraction Word Problems

Social Studies Activities:

___ North America Map

___ North America Animals

___ North America Plants

___ North America Places

___ North America Flags

___ North America Pictures

___ Parts of the Human Body

___ Parts of an Airplane

Geometry Activities:

___ Types of Angle Positions(C4)

___ Complementary and
Supplementary Angles(C5)

___ Rectangle Box

Language Arts Activities:

___ Homophones Set 1

___ Kitchen Nomenclature

___ Transportation Nomenclature

___ Vowel Tree - silent "e"

___ Blue Series Sight Words

___ Blue Series Phrases

___ Blue Series Pictures & Words 3

___ Blue Series Pictures & Words 4

___ Syllabication

___ Antonyms Set 1

___ Synonyms Set 1

Biology Activities:

___ Vertebrate Sorting

___ Plant Kingdom Chart

___ Plant Kingdom Nomenclature

___ Parts of a Porifera

___ Animal Stories Set 2

___ Plant Stories Set 2

Art & Music

___ Art Cards - Rembrandt

___ Color Nomenclature Cards

___ Composers: Beethoven

Choices:

Grade 2

September Workplan: Grade 2

Name: _____

Date: _____

Mathematics Activities:

___ Addition Bingo game (21)

___ Subtraction Bingo

___ M.B.B. & Mult. Layouts

2 3 4 5 6 7 8

___ Division Bead Board Factors

12 18 36 21

___ Triple Addends

___ Write Number Words for:

39 64 82 71 95 27 48 53

___ Stamp Game Equations (3 each)

+ - x ÷

___ Addition Facts

___ Subtraction Facts

___ Review Roman Numerals

Social Studies Activities:

___ Fundamental Needs Chart

___ Fundamental Needs Cards

___ Review World Map (continents & oceans)

___ September Calendar

___ Advanced Land/Water Set 1

___ Cardinal Positions on a Map

___ Advanced Land/Water Forms

___ Continent Objects

___ Impressionistic Chart 1

___ Chart 1 Experiments

Geometry Activities:

___ Geometry Folders: **A1 B1 B2**

___ Quadrilaterals

___ Rectangle Box

___ Geometry Cabinet

circles triangles

Language Arts Activities:

___ Central Theme Story Card

___ Antonyms Set 1

___ Synonyms Set 1

___ Spells Blue Series Booklets:

r-blends s-blends l-blends

___ Prefix/Suffix Card

___ Editing Strips

___ Prepositions

___ Symbolizing Set 1

Biology Activities:

___ Review Types of Vertebrates

___ Types of Trees

___ Types of Fish

___ Food Chain

___ Animal Research

Art & Music:

___ Famous Artists – Renoir

___ Color Nomenclature Cards

Choices:

October Workplan: Grade 2

Name: _____

Date: _____

Mathematics Activities:

___ Addition Bingo Game 2

___ Subtraction Bingo (21)

___ Multiplication Bingo (21)

___ Write 6 Fact Families (no doubles!)

Use this format: 6, 7, 13

6+7=13, 7+6=13, 13-6=7, 13-7=6

___ Checkerboard Equations

2345 5489 6723

x 3 x 2 x 4

___ Addition Facts

___ Subtraction Facts

Social Studies Activities:

___ Parts of the Earth

___ Earth Research

___ Child's Own Country - Map

___ Child's Own Country - Capitals

___ Child's Own Country - History

___ Fundamental Needs - Clothing

___ Advanced Land/Water Set 2

___ Rain Forest Research

___ Impressionistic Charts 2 3

___ Experiments for Charts 2 3

Geometry Activities:

___ Geometry Folders: **B3, B5**

___ Hexagon Box

___ Commands for Hexagon Box

Language Arts Activities:

___ Prefix Card

___ Synonyms Set 2

___ Antonyms Set 2

___ Person/Place/Thing

___ Common/Proper Nouns

___ Long Vowel/Short Vowel

___ Living/Non-Living

___ Syllabication Set 1

___ Spells Green Booklets

___ Reado Sets **1 2 3**

___ Symbolizing Set 2

___ Central Theme Story

___ Contractions Set 2

___ Noun Commands

Biology Activities:

___ Types of Leaves - Shape

___ Types of Amphibians

___ Food Pyramid

___ Characteristics of Vertebrates

___ Timeline of Life Research

___ Plant Research

Art & Music:

___ Art Cards - Chagall

___ Types of Musical Instruments

Choices:

November & December Workplan: Grade 2

Name: _____

Date: _____

Mathematics Activities:

___ Addition Bingo Game 3

Times: _____

___ Subtraction Bingo Game 2

___ Multiplication Facts

5x _____ 6x _____

___ Write 6 Fact Families

Use this format: 5, 4, 20

5 x 4=20, 4 x 5=20, 20 ÷ 4=5, 20 ÷ 5=4

___ Subtraction Word Problems

___ Clock Book

Social Studies Activities:

___ Europe Map (name countries)

___ Europe Plants

___ Europe Animals

___ Parts of a Volcano

___ Map of Volcanoes

___ Fundamental Needs -

Communication

___ Phases of the Moon

___ Advanced Land/Water Set 3

___ Parts of a Car

___ Geography Charts 4 5

___ Experiments for Charts 4 5

Geometry Activities:

___ Geometry Folders **C1, C2**

___ Commands for **C1, C2**

Language Arts Activities:

___ Adverb Matching Set 1

___ Adjective Matching Set 1

___ Singular/Plural

___ Contractions

Descriptive Writing

___ My Family

Describe a member of your family. What are they like? What kinds of things do they enjoy doing? What is your favorite thing about them?

___ Symbolizing Set 3

Biology Activities:

___ Types of Leaves – Species

___ Types of Reptiles

___ Plant Kingdom Chart

___ Plant Kingdom Nomenclature

Art & Music:

___ Art Cards - Cassatt

___ Types of World Instruments

Choices:

January Workplan: Grade 2

Name: _____

Mathematics Activities:

- ___ Construction of Decanomial
- ___ Checkerboard 1-digit multiplier
- ___ Stamp Game 1-digit divisor
- ___ Rounding
- ___ Measurement Story Problems
- ___ Patterning Work

Social Studies Activities:

- ___ Australasia Map
- ___ Australasia Flags
- ___ Australasia Animals
- ___ Australasia Plants
- ___ Australasia Places
- ___ Australasia Research
- ___ Fundamental Needs - Defense
- ___ Geography Charts 9 10
- ___ Experiments for Charts 9 10
- ___ Parts of a Train
- ___ Prehistoric Animals

Geometry Activities:

- ___ Geometry Folders: **C3, C4**
- ___ Commands for **C3, C4**
- ___ Geometric Solids

Language Arts Activities:

Study of the Noun:

- ___ Common and Proper Nouns
- ___ Concrete and Abstract Nouns
- ___ Collective Nouns
- ___ Article and Noun Agreement
- ___ Singular and Plural Nouns
- ___ Masculine and Feminine Nouns
- ___ Possessives of Nouns

___ Verb Tense Endings

___ Symbolizing Set 5

___ Poetry Guide - All About Poetry

Biology Activities:

- ___ Types of Seeds
- ___ Types of Mammals

Art & Music:

- ___ Famous Artists – Degas
- ___ Types of Musical Terms – Beginning

Choices:

February Workplan: Grade 2

Name: _____

Mathematics Activities:

- ___ Construction of Decanomial
- ___ Checkerboard 1-digit multiplier
- ___ Stamp Game 1-digit divisor
- ___ Rounding
- ___ Measurement Story Problems
- ___ Patterning Work

Social Studies Activities:

- ___ Africa Map
- ___ Africa Flags
- ___ Africa Animals
- ___ Africa Plants
- ___ Africa Places
- ___ Africa Research
- ___ Fundamental Needs - Shelter
- ___ Geography Chart 11
- ___ Experiments for Chart 11
- ___ Parts of an Airplane

Geometry Activities:

- ___ Geometry Folders: **C3, C4**
- ___ Commands for **C3, C4**
- ___ Geometric Solids

Language Arts Activities:

Study of the Noun:

- ___ Common and Proper Nouns
- ___ Concrete and Abstract Nouns
- ___ Collective Nouns
- ___ Article and Noun Agreement
- ___ Singular and Plural Nouns
- ___ Masculine and Feminine Nouns
- ___ Possessives of Nouns

___ Verb Tense Endings

___ Symbolizing Set 5

___ Poetry Guide - All About Poetry

Biology Activities:

- ___ Types of Herbs
- ___ Types of Fish

Art & Music:

- ___ Famous Artists – Rembrandt
- ___ Types of Musical Terms – Advanced

Choices:

March Workplan: Grade 2

Name: _____

Date: _____

Mathematics Activities:

- ___ Checkerboard – 2-digit multiplier
- ___ Fractions: addition with like denominator
- ___ Bar Graphs
- ___ Pie Charts
- ___ Bead Bars: Balancing Equations

Social Studies Activities:

- ___ North America Map
- ___ North America Animals
- ___ North America Flags
- ___ North America Places
- ___ Parts of the Human Body
- ___ Parts of a Bicycle
- ___ Fundamental Needs - Food
- ___ Geography Charts 12 13 14
- ___ Experiments for Charts 12 13 14
- ___ Types of Weather

Geometry Activities:

- ___ Geometry Folders **D1, D2**
- ___ Commands for **D1, D2**
- ___ Rectangle Box

Language Arts Activities:

- ___ Poetry Writing - Free Verse
- ___ Symbolizing Set 6
- ___ Reading Analysis Set 1
- ___ Grammar Nomenclature
- ___ Positive/Comp/Superlative
- ___ Compounds Set 3

Biology Activities:

- ___ Types of Herbs
- ___ Types of Invertebrates Set 1
- ___ Plants We Eat
- ___ Life Cycle of a Butterfly
- ___ Parts of an Egg

Art & Music

- ___ Art Cards – Van Gogh
- ___ Composers: Beethoven

Choices:

Grade 3

September Workplan: Level 3

Name: _____

Date: _____

Mathematics Activities:

- ___Checkerboard 2-digit x
- ___Square to Consecutive Square
- ___Binomial Multiplication
- ___Decanomial Layout
- ___Word Problems
- ___Small Bead Frame
- ___Stamp Game Division
- ___Decimal Card Rounding
- ___Multiplication Bingo Game
- ___Division Bingo Game

Social Studies Activities:

- ___South America Map
- ___South America Plant
- ___South America Animals
- ___Planet Research
- ___Types of Rocks
- ___Fundamental Needs - Legal
- ___Bones of the Human Body
- ___Needs of People Timelines
- ___Ancient Civilizations - Egypt
- ___Solar System

Geometry Activities:

- ___Geometry Folders

E1 E2

- ___Command Cards
- ___Area
- ___Quadrilaterals

Language Activities:

- ___All About Limericks
- ___Symbolizing
- ___Reading Analysis

Set 1 Set 2

- ___Prefix/Suffix Card
- ___Chapter Story
- ___Journal Writing (Daily):

September Journal						

- ___Degrees of Comparison
- ___Logical Adjectives
- ___Logical Adverbs
- ___Homonym Definitions
- ___Prepositions

Write a sentence for each:

- | | |
|---------|--------|
| near | under |
| inside | around |
| outside | on |
| between | behind |

Biology Activities:

- ___Plant Kingdom Chart
- ___Advanced Animal Research
- ___Advanced Plant Research
- ___Botany Chart 1A 1B
- ___Experiments for Botany Charts
- ___Parts of an Eye

October Workplan: Grade 3

Name: _____

Date: _____

Mathematics Activities:

- ___Checkerboard 3 digit x
- ___Square to Consecutive Square
- ___Squares of Numbers
- ___Multiplication Word Problems
- ___Division Word Problems
- ___Fractions
- ___Small Bead Frame
- ___Large Bead Frame
- ___Stamp Game Division
- ___Decimal Card Rounding
- ___Multiplication Bingo Game
- ___Division Bingo Game

Social Studies Activities:

- ___Earth Research
- ___Sun Research
- ___Astronomy Posters -
The Sun
- ___United States Map
- ___States and Capitals
- ___United States Research
- ___United States History
- ___Country Research
- ___Fundamental Needs - Money
- ___Planet Research
- ___Rain Forest Research
- ___Ancient Civilizations - China

Geometry Activities:

- ___Triangle Detective Game
- ___Command Cards
- ___Volume
- ___Area
- ___Symmetry

Language Activities:

- ___All About Rhymes
- ___Reading Analysis Set 2 Set 3
- ___Prefix Card
- ___Prefix One-to-Many
- ___Journal Writing (Daily):

October Journal Writing						

- ___Noun Commands
- ___Adjectives One-to-Many
- ___Antonym Matching
- ___Homonym Definitions
- ___Syllables **Set 1 Set 2**

Write a sentence for each adverb:

- | | |
|----------|-----------|
| quickly | slowly |
| loudly | correctly |
| sleepily | happily |

Biology Activities:

- ___The Plant Kingdom Chart
- ___Plant Research
- ___Animal Classification
- ___Advanced Animal Research
- ___Timeline of Life Research
- ___Botany Charts 2 3
- ___Experiments for Botany Charts
- ___Parts of a Tooth

Art & Music:

- ___Art Cards - Van Gogh
- ___Types of Musical Instruments

November & December Workplan: Grade 3

Name: _____

Date: _____

Mathematics Activities:

___Checkerboard 3x

4568	7852	4439
x 125	x 324	x 675

___Timed Multiplication Tests

Score: _____

___Rounding: nearest hundred

2346	48,756	548,934
------	--------	---------

___Money Word Problems

___Fractions Word Problems

Social Studies Activities:

___Europe Map (name countries)

___Parts of a Volcano

___Map of Volcanoes

___Astronomy Posters - Comets

___Fundamental Needs - Religion

___Phases of the Moon

___Parts of the Human Body

Pick one of your senses. How does it work? What parts of your body are involved? What information does it provide your body?

___State Research

Pick two states:

1. _____

2. _____

___Ancient Civilizations: Rome

Geometry Activities:

___Area

___Volume

___Perimeter

___Congruency

___Command Cards

Language Activities:

___Exercises for all parts of speech

___Symbolizing for all parts of speech

Creative Writing - Choose Topic:

Process Writing - Choose Topic:

___Grammar - Pronouns

___Fact vs. Opinion (3 examples)

Biology Activities:

___The Animal Kingdom

___Advanced Plant Research

___Timeline of Life Research

___Botany Charts 4 5

___Experiments for Botany Charts

Art & Music:

___Composer Research

___Art Research

Choices:

January Workplan: Grade 3

Name: _____

Date: _____

Mathematics Activities:

- ___Checkerboard Multiplication
- ___Multiplication with carrying
- ___Addition Facts review
- ___Subtraction Facts review
- ___Multiplication Facts review

2, 3, 4, 5, 6, 7, 8, 9

- ___Division Facts Review

Social Studies Activities:

- ___Earth's Atmosphere
- ___Fundamental Needs - Social Acceptance
- ___World Map
- ___Antarctica Map
- ___Antarctica Animals
- ___Antarctica Places
- ___Antarctica Pictures
- ___Study of Abraham Lincoln
- ___Study of George Washington
- ___Astronomy Poster - Stars

Geometry Activities:

- ___Perimeter
- ___Equivalence
- ___Area
- ___Volume
- ___Geometry Word Problems

Language Arts Activities:

- ___Singular/Plural

Set 9 Set 10

- ___Antonyms Set 3
- ___Homonyms Set 3
- ___Symbolizing Sentences 5
- ___Abbreviations
- ___READO Set 2
- ___Persuasive Letter Writing

Biology Activities:

- ___Botany Charts 8 9
- ___Experiments for Botany Charts

Art & Music:

Choices:

February Workplan: Grade 3

Name: _____

Date: _____

Mathematics Activities:

- ___Checkerboard Multiplication
- ___Multiplication with carrying
- ___Addition Facts review
- ___Subtraction Facts review
- ___Multiplication Facts review

2, 3, 4, 5, 6, 7, 8, 9

- ___Division Facts Review

Social Studies Activities:

- ___Earth's Atmosphere
- ___Fundamental Needs - Social Acceptance
- ___World Map
- ___Antarctica Map
- ___Antarctica Animals
- ___Antarctica Places
- ___Antarctica Pictures
- ___Study of Abraham Lincoln
- ___Study of George Washington
- ___Astronomy Poster - Stars

Geometry Activities:

- ___Perimeter
- ___Equivalence
- ___Area
- ___Volume
- ___Geometry Word Problems

Language Arts Activities:

- ___Singular/Plural

Set 9 Set 10

- ___Antonyms Set 3
- ___Homonyms Set 3
- ___Symbolizing Sentences 5
- ___Abbreviations
- ___READO Set 2
- ___Persuasive Letter Writing

Biology Activities:

- ___Botany Charts 8 9
- ___Experiments for Botany Charts

Art & Music:

Choices:

March Workplan: Grade 3

Name: _____

Date: _____

Mathematics Activities:

- ___ Stamp Game – 3-digit dynamic
- ___ Subtraction Word Problems
- ___ Division 4-digit w/Remainders
- ___ Checkerboard 3-digit multiplier

Social Studies Activities:

- ___ Europe Map
- ___ Europe Places
- ___ Europe Plants
- ___ Europe Places
- ___ Europe Animals
- ___ Europe Research
- ___ Fundamental Needs - Tools
- ___ Christ, the Center of History
- ___ Astronomy Concepts
- ___ Astronomy Posters - Meteors

Geometry Activities:

- ___ Metric Measurement
- ___ Polygon Stars

Language Arts Activities:

- ___ Creative Writing Commands
- ___ Similes
- ___ Commas
- ___ Syllabication

Descriptive Writing

- ___ My Family

Describe a member of your family. What are they like? What kinds of things do they enjoy doing? What is your favorite thing about them?

- ___ Letter Writing – letter to friend

Biology Activities:

- ___ Botany Charts 10 11
- ___ Experiments for Charts

Art & Music:

- ___ Famous Artists Sorting
- ___ Research Famous Composition

Choices:

Grade 4

September Workplan: Grade 4

Name: _____

Date: _____

Mathematics Activities:

Use of Comma with:

___Thousands and Millions

___Billions and Trillions

Use of Decimal Point with:

___Tenths

___Hundredths

___Thousandths

Types of Equations:

___Multiplication with carrying

___Addition with carrying

___Fractions Equations

___Division Facts

___Division Problems: Remainders

___Multiplication of a Binomial

___Addition w/ Negative

Numbers

Geography:

___Pin Map for Child's Own
Country

___Geography Charts 18 19

___Experiments for Charts

History:

___Ancient Civilizations - Mayan

___Timelines - Shelter through
History

___Types of Fossils

Physical Science:

Matter

___Gases

___Passing from Solid to Liquid

___Passing from Liquid to Gas

___Chemical Reactions

___Forces Set 1, Chart 1

Geometry Activities:

___Parts of a Parallelogram

___Types of Polygons

___Circles and Straight Lines

___Calculating Perimeter

___Calculating Area

Language Arts Activities:

Plural Sets:

___s and es

___y to i and es

___foreign plurals

___singular as plural; plural as
singular

___Abbreviation

___Compound Words

___Contractions

___Advanced Antonyms

___Advanced Synonyms

___Common and Proper Rules

Biology Activities:

___Six Kingdom Chart & Cards

Classification of Plant Kingdom

___Domain

___Kingdom

___Phylum

___Class

___Order

___Family

___Genus

___Species

___Variety

Art & Music:

___Research Baroque Period

October Workplan: Grade 4

Name: _____

Date: _____

Mathematics Activities:

- ___ Decanomial Layout - Vertical
- ___ Test Tube Division - 2 digit divisor
- ___ Abstract Dynamic Addition
- ___ Abstract Dynamic Subtraction
- ___ Squares of Numbers 1-9
- ___ Addition of Decimals
- ___ Fractions: Like Denominator

History:

- ___ Ancient Civilizations: Sumerian

Geography:

- ___ Geography Charts 20 21
- ___ Experiments for Charts
- ___ Pin Map: Africa
- ___ Coastlines
- ___ Types of Low Coasts
- ___ Types of High Coasts
- ___ Types of Irregular Coasts

Physical Science:

- ___ Forces Set 1, Chart 2
- ___ Gases
- ___ PH: Acid or Base

Geometry Activities:

- ___ Weight (using a scale)
- ___ Angles formed by Transversal
- ___ Bisector of Angle
- ___ Parts of a Rectangle
- ___ Measuring Angles - protractor

Language Arts Activities:

- ___ Capitalization Rules
- ___ Oral Book Report
- ___ Simile/Metaphor
- ___ Transitive/Intransitive/Linking Verbs
- Types and Functions of Nouns
- ___ Common/Proper
- ___ Capitalization Rules
- ___ Concrete/Abstract
- ___ Collective
- ___ Singular/Plural
- ___ Masculine/Feminine
- ___ Possessive
- ___ Article/Noun Agreement
- ___ Symbolizing

Biology Activities:

- Physiology of Plants
- ___ Preservation of Plant Life
- ___ Respiration
- ___ Excretion
- ___ Digestion
- ___ Circulation
- ___ Domain Research: Eubacteria
- ___ Animal Kingdom: Chinese Box
- ___ Systems of Body Research: Nervous System

Art & Music:

- ___ Renaissance Research

November & December Workplan: Grade 4

Name: _____

Date: _____

Mathematics Activities:

- ___ Abstract Dynamic Multiplication
- ___ Abstract Dynamic Division
- ___ Test Tube Division: 3 digit
- ___ Advanced Story Problems
- ___ Decanomial Layout: Horizontal
- ___ Multiplication with Fractions
- ___ Probability
- ___ Rounding

History:

- ___ Ancient Civilizations: Babylonian

Geography:

- ___ Geography Charts 22 23
- ___ Experiments for Charts
- ___ Pin Map: Asia
- ___ Groupings of Mountains
- ___ Parts of Mountain Chain
- ___ Types of Plains
- ___ Types of Valleys

Physical Science:

- ___ Forces Set 1, Chart 3

Geometry:

- ___ Circles in Relation to Other Circles
- ___ Volume
- ___ Area

Language Arts Activities:

- Types and Functions of Articles
 - ___ Definite and Indefinite
 - ___ Symbolizing
- Types and Functions of Adjectives
 - ___ Descriptive and Numeral
 - ___ Indefinite, Demonstrative, and Possessive
- Creative Writing
 - ___ Writing Dialogue
 - ___ Writing a Play
 - ___ Cause and Effect
- Punctuation
 - ___ Apostrophe
 - ___ Colon
 - ___ Comma
 - ___ Dash
 - ___ Ellipse

Biology:

- Vital Functions of Animals (choose one vertebrate to research):
 - ___ Nutrition
 - ___ Respiration
 - ___ Circulation
 - ___ Support
 - ___ Nervous System
 - ___ Movement
 - ___ Sensitivity
 - ___ Preservation
- ___ Plants - Timeline of Life Research
- ___ Plant Dissection

Art & Music:

- ___ Impressionistic Artists
- ___ Romantic Composers

January Workplan: Grade 4

Name: _____

Date: _____

Mathematics Activities:

- ___ Checkerboard 4 digit x
- ___ Bead Frame 4 digit +
- ___ Bead Frame 4 digit -
- ___ Stamp Game 4 digit ÷
- ___ Squares and Cubes
- ___ Binomial Cube & Equation
- ___ Trinomial Cube & Equation
- ___ Negative Numbers

Social Studies Activities:

- ___ History of Child's Country
- ___ Child's Country Research

Geography:

- ___ Types of Coastlines
- ___ Coastline Research
- ___ Africa Pin Map

Geometry Activities:

- ___ Complete & Straight Angles
- ___ Right, Acute, and Obtuse
- ___ Angle Nomenclature Cards
- ___ Measurement of Angles

Language Arts Activities:

- ___ Adjectives One-to-Many
- ___ Fact vs. Opinion - 3 examples
- ___ Irregular Verb Tenses
- ___ Biography Book Report

Biology Activities:

- ___ Parts of an Eye
- ___ Chinese Box Classification

Health:

- ___ Human Body Model
- ___ Health Advanced Studies
Cards

Art & Music:

- ___ Art Research
- ___ Music Research

Choices:

February Workplan: Grade 4

Name: _____

Date: _____

Mathematics Activities:

- ___Checkerboard 4 digit x
- ___Bead Frame 4 digit +
- ___Bead Frame 4 digit -
- ___Stamp Game 4 digit ÷
- ___Squares and Cubes
- ___Binomial Cube & Equation
- ___Trinomial Cube & Equation
- ___Negative Numbers

Social Studies Activities:

- ___History of Child's Country
- ___Child's Country Research

Geography:

- ___Types of Coastlines
- ___Coastline Research
- ___Africa Pin Map

Geometry Activities:

- ___Complete & Straight Angles
- ___Right, Acute, and Obtuse
- ___Angle Nomenclature Cards
- ___Measurement of Angles

Language Arts Activities:

- ___Adjectives One-to-Many
- ___Fact vs. Opinion - 3 examples
- ___Irregular Verb Tenses
- ___Biography Book Report

Biology Activities:

- ___Parts of an Eye
- ___Chinese Box Classification

Health:

- ___Human Body Model
- ___Health Advanced Studies
Cards

Art & Music:

- ___Art Research
- ___Music Research

Choices:

February Workplan: Grade 4

Name: _____

Date: _____

Mathematics Activities:

___Checkerboard (4-digit multiplier)

Bead Frame:

___Dynamic Addition

___Dynamic Subtraction

___Stamp Game Division

Advanced Math Word Problems:

___Addition

___Subtraction

___Multiplication

___Division

___Fractions – Addition

___Measurement – Addition

___Money – Addition

___Money - Subtraction

___Binomial Equation & Cube

History:

___Ancient Civilizations: China

___Timeline: Defense
through the Ages

Geography:

___Pin Map: North America

___Types of Islands & Reefs

___Islands & Reefs Research

Geometry Activities:

___Congruent, Similar, Equivalent

___Volume Comparison

___Review of Triangle Types

___Detective Adjective Game

Language Arts Activities:

Biology Activities:

___Pick one animal to research;
find its classification from
Kingdom to Species

Physical Science:

___Patterns in Nature

Art & Music:

___Pick Artist to Research

___Pick Composer to Research

Choices:

Attachment 5

Sample School Calendar and Schedule

August 2020

August 2020							September 2020						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
2	3	4	5	6	7	8	6	7	8	9	10	11	12
9	10	11	12	13	14	15	13	14	15	16	17	18	19
16	17	18	19	20	21	22	20	21	22	23	24	25	26
23	24	25	26	27	28	29	27	28	29	30			
30	31												

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Jul 26	27	28	29	30	31	Aug 1
2	3	4	5	6	7	8
	Teacher Prep					
	Teachers Report to Work					
9	10	11	12	13	14	15
	Teacher Prep					
				Education Committee		
16	17	18	19	20	21	22
	Teacher Prep		Back to School Event First day of Classes			
23	24	25	26	27	28	29
			School Advisory Council		Family Event	
30	31	Sep 1	2	3	4	5

September 2020

September 2020							October 2020						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
6	7	1	2	3	4	5	4	5	6	7	1	2	3
13	14	8	9	10	11	12	11	12	13	14	8	9	10
20	21	15	16	17	18	19	18	19	20	21	15	16	17
27	28	22	23	24	25	26	25	26	27	28	22	23	24
		29	30						29		29	30	31

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Aug 30	31	Sep 1	2	3	4	5
6	7 Labor Day (United States)	8	9 4:00pm Staff Meeting	10 Education Committee	11	12
13	14 3:00pm School Data Meeting	15 Board Finance Committee Meeting	16 4:00pm Staff Meeting	17	18	19 Board Retreat
20	21 5:00pm Board Meeting	22 School Advisory Council 3:00pm School Data Meeting	23 4:00pm Staff Meeting	24	25 No School Staff Professional Development Day	26
27	28 3:00pm School Data Meeting	29	30 4:00pm Staff Meeting 6:00pm Literacy Night	Oct 1	2	3

October 2020

October 2020							November 2020						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3	1	2	3	4	5	6	7
4	5	6	7	8	9	10	8	9	10	11	12	13	14
11	12	13	14	15	16	17	15	16	17	18	19	20	21
18	19	20	21	22	23	24	22	23	24	25	26	27	28
25	26	27	28	29	30	31	29	30					

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Sep 27	28	29	30	Oct 1	2	3
4	5 Field Trip	6 Interim Assessments	7 4:00pm Staff Meeting	8 Education Committee	9	10
11	12 Columbus Day (United States)	13 3:00pm School Data Meeting	14 4:00pm Staff Meeting	15 School Pictures 6:00pm Parent Engagement Workshop	16 6:00pm Evening Family Event	17
18	19 8:00am Board Meeting	20 School Advisory Council	21 4:00pm Staff Meeting	22	23 Annual Fundraiser: \$20,000 Goal	24
25	26 3:00pm School Data Meeting	27	28 4:00pm Staff Meeting	29	30 Halloween Celebration	31 Halloween (United States)

November 2020

November 2020							December 2020						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7			1	2	3	4	5
8	9	10	11	12	13	14	6	7	8	9	10	11	12
15	16	17	18	19	20	21	13	14	15	16	17	18	19
22	23	24	25	26	27	28	20	21	22	23	24	25	26
29	30						27	28	29	30	31		

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Nov 1	2	3 Election Day (United States)	4 4:00pm Staff Meeting	5	6	7
8	9 AIMS/MAP Testing	10	11 Veteran's Day (United States)	12 Board Finance Committee Meeting Education Committee	13	14
15	16 Board Meeting	17	18 4:00pm Staff Meeting	19 3:00pm School Data Meeting	20	21
22	23 Book Fair Distribute Staff Survey	24	25 Collect Surveys 4:00pm Staff Meeting	26 Thanksgiving Break Thanksgiving Day (United States)	27 Day After Thanksgiving Day (United States)	28
29	30	Dec 1	2	3	4	5

December 2020

December 2020							January 2021						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
6	7	1	2	3	4	5	3	4	5	6	7	1	2
13	14	8	9	10	11	12	10	11	12	13	14	8	9
20	21	15	16	17	18	19	17	18	19	20	21	22	23
27	28	22	23	24	25	26	24	25	26	27	28	29	30
		29	30	31			31						

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Nov 29	30	Dec 1	2 4:00pm Staff Meeting	3	4	5
6	7 Board Finance Committee Meeting	8 Family Event	9 4:00pm Staff Meeting	10 Education Committee School Data Meeting	11	12
13	14 Interim Assessment 2 Board Meeting	15 School Advisory Council	16 4:00pm Staff Meeting	17 Staff Data Meetings	18	19
20	21	22	23	24 Christmas Eve (United States)	25 Christmas Day (United States)	26
27	28	29	30	31 New Year's Eve (United States)	Jan 1, 21	2

January 2021

January 2021							February 2021						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
3	4	5	6	7	1	2	7	1	2	3	4	5	6
10	11	12	13	14	8	9	14	8	9	10	11	12	13
17	18	19	20	21	15	16	21	15	16	17	18	19	20
24	25	26	27	28	22	23	28	22	23	24	25	26	27
31					29	30							

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Dec 27	28	29	30	31	Jan 1, 21 Christmas Break New Year's Day (United States)	2
3	4	5	6 4:00pm Staff Meeting	7 3:00pm School Data Meeting	8	9
10	11	12 School Advisory Council	13 4:00pm Staff Meeting	14 Education Committee	15 Recruitment Event	16
17	18 Martin Luther King Day (United States)	19	20 4:00pm Staff Meeting	21 Finance Committee Meeting School Data Meeting	22 Parent/Teacher Conferences	23
24	25 Board Meeting	26 Family Event	27 4:00pm Staff Meeting	28 Student Presentations	29 No School Staff Professional Development	30
31	Feb 1	2	3	4	5	6

February 2021

February 2021							March 2021						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
7	1	2	3	4	5	6	7	1	2	3	4	5	6
14	8	9	10	11	12	13	14	8	9	10	11	12	13
21	15	16	17	18	19	20	21	15	16	17	18	19	20
28	22	23	24	25	26	27	28	22	23	24	25	26	27

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Jan 31	Feb 1 AIMS/MAPS Testing	2 Groundhog Day (United States)	3 4:00pm Staff Meeting	4	5	6
7	8	9	10 4:00pm Staff Meeting	11 Education Committee 3:00pm School Data Meeting	12	13
14 Valentine's Day (United States)	15 Presidents' Day (United States)	16 Interim Assessment	17 4:00pm Staff Meeting	18 Family Evening Event	19	20
21	22 Board Meeting	23 School Advisory Council	24 4:00pm Staff Meeting	25 School Data Meeting	26	27
28	Mar 1	2	3	4	5	6

March 2021

March 2021							April 2021						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
7	1	2	3	4	5	6	4	5	6	7	1	2	3
14	8	9	10	11	12	13	11	12	13	14	15	16	17
21	15	16	17	18	19	20	18	19	20	21	22	23	24
28	22	23	24	25	26	27	25	26	27	28	29	30	

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Feb 28	Mar 1	2	3 4:00pm Staff Meeting	4	5	6
7	8	9 3:00pm School Data Meeting	10 4:00pm Staff Meeting	11 Education Committee School Data Meeting	12	13
14	15	16	17 Testing Week St. Patrick's Day (United States) 4:00pm Staff Meeting	18	19	20
21	22 Board Meeting	23 School Advisory Council	24 Student Presentations 4:00pm Staff Meeting	25	26	27
28	29	30	31 Spring Break	Apr 1	2	3

April 2021

April 2021							May 2021						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
4	5	6	7	1	2	3	2	3	4	5	6	7	1
11	12	13	14	8	9	10	9	10	11	12	13	14	8
18	19	20	21	15	16	17	16	17	18	19	20	21	15
25	26	27	28	22	23	24	23	24	25	26	27	28	22
				29	30		30	31					29

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Mar 28	29	30	31	Apr 1 Spring Break	2	3
4 Easter Day (United States)	5	6 3:00pm School Data Meeting	7 4:00pm Staff Meeting	8 Education Committee	9	10
11	12	13	14 4:00pm Staff Meeting	15 Tax Day (United States)	16 Admissions Lottery	17
18	19 Board Meeting	20 School Advisory Council	21 Administrative Professionals Day (United States) 4:00pm Staff Meeting	22 School Data Meeting	23	24
25	26	27	28 4:00pm Staff Meeting	29	30	May 1
	Student STEAM Expo					

May 2021

May 2021							June 2021						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
2	3	4	5	6	7	8	6	7	8	9	10	11	12
9	10	11	12	13	14	15	13	14	15	16	17	18	19
16	17	18	19	20	21	22	20	21	22	23	24	25	26
23	24	25	26	27	28	29	27	28	29	30			
30	31												

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Apr 25	26	27	28	29	30	May 1
2	3	4 3:00pm School Data Meeting	5 4:00pm Staff Meeting	6	7	8
9 Mother's Day (United States)	10	11	12 4:00pm Staff Meeting	13 Education Committee School Data Meeting	14	15
16	17 Interim Assessments	18	19 4:00pm Staff Meeting	20	21	22
23	24 Board Meeting	25 School Advisory Council	26 4:00pm Staff Meeting	27 3:00pm School Data Meeting	28	29
30	31 Memorial Day (United States)	Jun 1	2	3	4	5

June 2021

June 2021							July 2021						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
6	7	1	2	3	4	5	4	5	6	7	1	2	3
13	14	8	9	10	11	12	11	12	13	14	8	9	10
20	21	15	16	17	18	19	18	19	20	21	15	16	17
27	28	22	23	24	25	26	25	26	27	28	22	23	24
		29	30								29	30	31

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
May 30	31	Jun 1 AIMS/MAPS 4:00pm Staff Meeting	2 4:00pm Staff Meeting	3	4	5
6	7	8 School Data Meeting	9 4:00pm Staff Meeting	10 Education Committee	11	12
13	14	15 School Advisory Council	16 4:00pm Staff Meeting	17 School Field Day	18 Last Day of School	19
20 Father's Day (United States)	21 Board Meeting	22	23 4:00pm Staff Meeting	24	25	26
27	28	29	30 4:00pm Staff Meeting	Jul 1	2	3

July 2021

July 2021							August 2021						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3	1	2	3	4	5	6	7
4	5	6	7	8	9	10	8	9	10	11	12	13	14
11	12	13	14	15	16	17	15	16	17	18	19	20	21
18	19	20	21	22	23	24	22	23	24	25	26	27	28
25	26	27	28	29	30	31	29	30	31				

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Jun 27	28	29	30	Jul 1	2	3
4 Independence Day (United States)	5 Independence Day (Observed) (United States)	6	7 4:00pm Staff Meeting	8 Education Committee	9	10
11	12	13	14 4:00pm Staff Meeting	15	16	17
18	19	20	21 4:00pm Staff Meeting	22	23	24
25	26	27	28 4:00pm Staff Meeting	29	30	31

Sample Weekly Schedule

MAPS Sample Weekly Schedule for Lower (LE) and Upper (UE) Elementary					
Day/Time	Monday	Tuesday	Wednesday	Thursday	Friday
8:00 – 8:15	Students Arrive Check-in				
8:15-8:30	Morning Meeting				
8:30-9:00	Pull-Outs				
9:00-12:00	Uninterrupted Work Time - Core Subjects				
12:00-12:45	Lunch-Recess LE/ Special UE	Lunch-Recess LE/ Special UE	Lunch-Recess LE/ Special UE	Lunch-Recess LE/ Special UE	Lunch-Recess LE/ Special UE
12:45-1:30	Lunch-Recess UE/ Special LE	Lunch-Recess UE/ Special LE	Lunch-Recess UE/ Special LE	Lunch-Recess UE/ Special LE	Lunch-Recess UE/ Special LE
1:30-2:15	Work Time/ Special	Work Time/ Special	Work Time	Work Time/ Special	Work Time/ Special
2:15-3:00	Work Time/ Special	Work Time/ Special	Work Time	Work Time/ Special	Work Time/ Special
3:00-3:15	Chores & Dismissal				
	Possible Extended Day and/or Extra-Curricular Activities				

Attachment 6

Admissions Policy

MAPS will develop an open admissions policy which uses a random, blind lottery for selection of incoming students pursuant to IN Charter School Law. The only exception to lottery procedure will be for siblings of current MAPS students. These students will be accepted directly without needing to enter the lottery. Recruitment efforts will be targeted to communities within a four-mile range of each of MAPS' Campuses.

An online and paper admissions application will be available to the public in March of each year. There will also be a minimum of two Open House events for Prospective Parents and Students. In addition, staff members will visit area preschools and elementary schools for recruitment events, pending the availability of staff.

Included in the application packet will be a background and history of MAPS, descriptions of academic programs, student disciplinary code requirements, dates for Open Houses and application submission deadlines.

Lottery Procedure

Each submitted application will be checked for appropriate parent signatures and assigned a number for lottery purposes. There will be no advantage given to early submission. The lottery will be "closed" on a predetermined date meaning that all applications received after this date will be given waitlist status. These late applications are also dated.

On the date of the lottery, the following procedure determines the application number:

- Total enrollment for incoming students based on MAPS' projected enrollment for new students.
- Projected Enrollment – Sibling Enrollment Applications = Lottery Enrollment.
- Each student application will be numbered 1 - _____ (Total number of applicants).
- A corresponding set of lottery tickets will be numbered with the same.
- Lottery tickets with corresponding number to sibling enrollments will be removed from the lottery collection. The result is the pool of candidates for the enrollment lottery.
- Lottery tickets will be placed in a protected box and mixed thoroughly. An outside Process Observer will verify the procedure.

- The total number of lottery tickets determined in Step 2 will be drawn from the protected box, with numbers hidden from view until fully withdrawn.
- Selected lottery tickets will be recorded on the lottery grid.
- Numbers will be matched to lottery spreadsheet to identify accepted students.
- An Outside Process Observer will sign the lottery witness verification.

Waitlist Creation

- Remaining lottery tickets will be drawn in a one-by-one order and entered into the Waitlist Grid - thus creating the Enrollment Waitlist.
- Numbers will be matched to the lottery spreadsheet – thus identifying accepted students.
- Late applications will be added to the end of the waitlist in sequential order as they are received.

Notification

Students will be notified of Acceptance or Waitlist status in two ways: A letter is sent to their homes, and an email or fax is sent to the Guidance Counselor at their elementary school (if applicable). Families have a deadline by which signed Acceptance Notification letters must be returned to MAPS. Families who fail to return their letters to MAPS by this deadline sacrifice their accepted status. Thus:

$$\text{Accepted Students} - \text{Total Returned Acceptance Letters} = \text{Waitlist Acceptances}$$

Waitlist Accepted students will receive notification of selection in the same means above. They will have ten business days to sign and return Acceptance letters, or they lose accepted status. Additional waitlist letters will be generated and sent until enrollment numbers are reached.

All remaining waitlist student applications will be kept on file, with late arrivals added to the end of the list upon receipt. After the first two weeks of school, additional waitlist candidates will be contacted pending student “no-shows.”

Attachment 8

Community Engagement Documents



Community Forum to Discuss MONTESSORI ACADEMY PREPARATORY SCHOOL A Proposed K-8 Charter School

Learn more about The Montessori Educational Charity's plans to open **Montessori Academy Preparatory School (MAPS)** - a proposed public charter school serving grades K-8 by Fall 2020!

Date: January 25, 2019

Time: 5:00-6:00 PM

Location: Indianapolis Public Library: Michigan Road Branch

Address: 6201 Michigan Road, Indianapolis, IN 46268

Room: Community Room

For more information, please contact
Vivian Cain, President/CEO:

Email: hello@inmontessori.com

Phone: 317-769-2220



Community Forum to Discuss MONTESSORI ACADEMY PREPARATORY SCHOOL A Proposed K-8 Charter School

Learn more about The Montessori Educational Charity's plans to open **Montessori Academy Preparatory School (MAPS)** - a proposed public charter school serving grades K-8 by Fall 2020!

Date: January 30, 2019

Time: 6:00-7:30 PM

Location: Hussey-Mayfield Memorial Library

Address: 250 N. 5th Street, Zionsville, IN 46077

Room: Lora Hussey Room

For more information, please contact
Vivian Cain, President/CEO:

Email: hello@inmontessori.com

Phone: 317-769-2220

The Montessori Educational Charity

Recipient: Vivian Cain

Letter: Greetings,

I support the opening of Montessori Academy Preparatory School!

Signatures

Name	Location	Date
James Miletello	USA	2019-01-23
Vivian Cain	Edison, New Jersey, US	2019-01-23
Kylee Pearson	Whitestown, Indiana, US	2019-01-23
Olga Chernyak	Carmel, Indiana, US	2019-01-23
Trevor Pike	Noblesville, Indiana, US	2019-01-23
Elizabeth Pike	Carmel, Indiana, US	2019-01-23
Rodney Frederick	Zionsville, Indiana, US	2019-01-23
Miriam Tedley	Indianapolis, Indiana, US	2019-01-23
Simona Reising	Indianapolis, Indiana, US	2019-01-23
Sarah Jonker	Yellowknife, Canada	2019-01-23
Elizabeth Nocera	Brownsburg, Indiana, US	2019-01-23
Leslie Gimbel	Whitestown, Indiana, US	2019-01-23
Stephanie Collins	Indianapolis, Indiana, US	2019-01-23
Laura Burger	Anderson, Indiana, US	2019-01-24
Heidi Cogdill	Indianapolis, Indiana, US	2019-01-24
Linda Bayan	Chicago, Indiana, US	2019-01-24
Demetrice Smith	Indianapolis, Indiana, US	2019-01-24
Cristina Hernandez	Fishers, Indiana, US	2019-01-24
Megan Happe	Indianapolis, Indiana, US	2019-01-24
Alia Abouchala	Orlando, Florida, US	2019-01-24

Name	Location	Date
Jonathan Kroenke	Indianapolis, Indiana, US	2019-01-24
Ashley Kalley	Indianapolis, Indiana, US	2019-01-24
Erin Seacat	mooreville, Indiana, US	2019-01-24
Peggy Collins	Indianapolis, Indiana, US	2019-01-24
Joy Rees	Indianapolis, Indiana, US	2019-01-24
Sarra Aidaoui	Indianapolis, Indiana, US	2019-01-24
LaToya Dix	Zionsville, Indiana, US	2019-01-24
DUSTIN TOBIAS	Carmel, Indiana, US	2019-01-24
Ty Gimbel	Whitestown, Indiana, US	2019-01-24
Rabiaa Bayan	Doha, Qatar	2019-01-24
Lama El chal	Riyadh, Saudi Arabia	2019-01-24
Chaza Araji	Doha, Qatar	2019-01-24
Yamina Rezzag	Saint Paul, Minnesota, US	2019-01-24
Philomena Goson	Indianapolis, Indiana, US	2019-01-24
LeaTreacia Lightle	Fort Wayne, Indiana, US	2019-01-24
Erin Dunlevy	Carmel, Indiana, US	2019-01-24
Vicki Tiller	Chicago, Illinois, US	2019-01-24
Courtney Bray	Zionsville, Indiana, US	2019-01-24
Luschin Harnish	Woodbury, US	2019-01-24
Harishankar kushwaha	Danville, US	2019-01-25
Kanika Puri	Indianapolis, Indiana, US	2019-01-25
Vanessa Frederick	Indianapolis, Indiana, US	2019-01-25

Name	Location	Date
Mitzi Arizpe	Denver, US	2019-01-25
Jillian Venci Fuhs	Zionsville, Indiana, US	2019-01-25
Jessica Pina	Pasadena, US	2019-01-25
Vivian Cain	Zionsville, Indiana, US	2019-01-25
Andrew Neddo	Indianapolis, Indiana, US	2019-01-25
Carlos Portillo	Dimmitt, US	2019-01-25
Cecil Cain	Easton, Pennsylvania, US	2019-01-26
Mallorie Malloy-Coe	Catonsville, Maryland, US	2019-01-26
Andrew Weber	Slinger, US	2019-01-26
Margee Stevenson	Hanover, US	2019-01-26
Connor Cudd	Shreveport, US	2019-01-26
Shanda Brownlee	Monmouth, US	2019-01-27
Sammy Gekchyan	Glendale, US	2019-01-27
John Dexheimer	Taylorville, US	2019-01-27
Flodure Penure	Melissa, US	2019-01-27
Cassie Rosato	US	2019-01-27
Sharon Hawkins	Tuscaloosa, Alabama, US	2019-01-27
Dewayne Boyd	Indianapolis, Indiana, US	2019-01-27
Tamla Cain	Indianapolis, Indiana, US	2019-01-27
Eva Cullen	Millsboro, US	2019-01-27
Chris Degraff	US	2019-01-27
Jaxson Hill	Powell, US	2019-01-28

Name	Location	Date
;)!	US	2019-01-28
Nadia Adams	Indianapolis, Indiana, US	2019-01-28
Mitchell Mccutcheon	Saint Paul, US	2019-01-28
Kolby Pickel	Shippensburg, US	2019-01-28
Stephanie Cicio	Meriden, US	2019-01-28
Zachary rose	Bear Creek, US	2019-01-28
Drayton Dydasco	Richmond, US	2019-01-28
Ronald Singleton	Frederick, US	2019-01-28
Caleb Fukuhara	Wilmington, US	2019-01-28
steven pearce	Plymouth, US	2019-01-28
Daddy Around these parts	Barstow, US	2019-01-28
Ayana Burson	Cleveland, US	2019-01-28
AJ Digirolomo	Manhasset, US	2019-01-28
Matt Belliveau	Denver, US	2019-01-28
Dylan Doebler	Mifflinburg, US	2019-01-28
Taylor Noelle	Chicago, US	2019-01-28
Allyson Bradford	Indianapolis, Indiana, US	2019-01-28
William Holland-Layton	Hershey, US	2019-01-28
Nick Pepin Pepin	US	2019-01-29
Alexandra Johnson	Chicago, US	2019-01-29
amarah dove	Terra haute, US	2019-01-29
Marsha Brown	Culpeper, US	2019-01-29

Name	Location	Date
Sanchia Putri Az Zahra	Mountain View, US	2019-01-29
Tate Hohbein	Bismarck, US	2019-01-29
Ke Von	Topeka, US	2019-01-29
Lewis Bradford	Indianapolis, Indiana, US	2019-01-29
Riley Anderson	Bismarck, US	2019-01-29
Anthony Porta	Brooklyn, US	2019-01-29
Arianna Pershing	Chicago, US	2019-01-29
Hannah Salazar	Indianapolis, US	2019-01-29
Tiffany White	Indianapolis, Indiana, US	2019-01-29
Andrew Galang	Villa Park, US	2019-01-29
Julia Duffy	Stony Brook, US	2019-01-29
Gil Thunder	US	2019-01-29
Caleb Abrell	Indianapolis, US	2019-01-29
James Snotflinger	Detroit, US	2019-01-29
Petar Kostic	Cedar Lake, US	2019-01-29
Maya Chalico	Houston, US	2019-01-29
Nagoor Yusuff	Zionsville, Indiana, US	2019-01-29
hunter mitchell	Mocksville, US	2019-01-29
Lars Jonker	Zionsville, Indiana, US	2019-01-29
Luke Frantz	Cleveland, US	2019-01-29
Trevor Hoopengardner	Toronto, US	2019-01-29
Abi Wijay	Moses Lake, US	2019-01-29

Name	Location	Date
Maya V	Brooklyn, US	2019-01-29
Katie Mangan	Westlake, US	2019-01-29
Jack Nancy	San Antonio, US	2019-01-29
Dhiti Nanavati	San Jose, US	2019-01-29
Jenny Ambroise	Indianapolis, Indiana, US	2019-01-29
Qazi Ansar Ahmad	Denver, US	2019-01-29
Adam Yeo	Wooster, US	2019-01-29
Brian Umbach	State College, US	2019-01-30
Ben Ledbetter	Beaver, US	2019-01-30
John Jamison	Windsor, US	2019-01-30
Big Chungus	Blanchard, US	2019-01-30
jade olivieri	Panorama City, US	2019-01-30
Kent winchenbach	Friendship, US	2019-01-30
Akeber Bulding	Tampa, US	2019-01-30
Danielle Lowe	Martinsburg, US	2019-01-30
Solveig Nolasco	New York, US	2019-01-31
Alex Ramos	Fresno, US	2019-01-31
Victoria Petersen Elia	Indianapolis, Indiana, US	2019-01-31

Attachment 9

Principal

Montessori Academy Preparatory School (MAPS):
An Initiative of The Montessori Educational Charity

Principal Job Description

Job Title: Principal

Reports To: Board President/CEO

Summary: - The Principal will provide leadership for each school/campus operated by the MEC. The Principal is a Principal-Level role and will use leadership, supervisory, and administrative skills to promote the educational development of each student in the assigned building.

Responsibilities:

Curriculum Development, Supervision and Evaluation:

- Understands school curriculum, ensures teaching of the written curriculum, and helps staff use curriculum resources
- Participates in curriculum development activities led by Lead Teachers
- Provides opportunities and encouragement for staff to increase program expertise
- Identifies curricular and extra curricular needs by analyzing current programs and student achievement
- Implements curricular and extra-curricular programs to address needs identified by Lead Teachers
- Regularly uses the results of the student assessment data to identify problems and assist Lead Teachers to implement program improvements and/or pacing

Student Assessment and Monitoring:

- Emphasizing student achievement as the primary outcome of schooling
- Systematically assessing and monitoring student progress using objective and verifiable information whenever possible
- Working with staff to systematically identify and respond to at risk students; making referrals to appropriate community agencies when needed

-
- Providing meaningful information to parents and others regarding student progress
 - Maintaining policies and practices for grading, reporting, and promoting
 - Coordinate Summer Learning Academy

Student and Staff Relations

- Models and facilitates good human relations skills; effectively interacts with others
- Solicits information from school personnel and community in gauging the school climate
- Recognizes efforts of students and teachers
- Promotes the improvement of student and staff self-images
- Communicates high expectations for both staff and students and provides appropriate motivation to reach expectations
- Attends special events held to recognize student achievement and attends school sponsored activities
- Fosters collegial relationship with and among teachers and staff

Establishing an Effective Workplace and Work with the President/CEO to:

- Develop and maintain positive staff morale
- Define and articulate a school philosophy with vision through board adopted goals and administrative recommended objectives
- Conduct meetings of the staff as necessary for the proper functioning of the school
- Implement a discipline code that is fair and promotes orderliness and student learning
- Protect instructional time by minimizing interruptions to the instructional process

-
- Coordinate teacher and student schedules to promote maximum learning and minimize conflict
 - Maintain high visibility in the school
 - Provide for adequate supervision and acceptable student behavior at all school functions planned and operated by school personnel

Staff Supervision, Personnel Evaluation and Work with the President/CEO and Director of Finance and Operations to:

- Supervise professionals, teacher assistants, secretaries, and classroom volunteers within the building
- Implement the district wide personnel evaluation program
- Demonstrate objectivity in personnel evaluation

Communications, Community Relations, and Assist the President/CEO in:

- Listening and responding appropriately to staff, student, and community concerns
- Respecting differences of opinions and fostering open communications among staff
- Developing communications that reflect and support management team decision in the implementation of school board policies
- Communicating effectively with students; individually and in groups
- Speaking and writing effectively
- Keeping the superintendent and other appropriate central office administrators informed of school activities and problems such as transportation, special services, etc.
- Communicating and working with central office and other principals to share ideas, problems, expertise, and personnel
- Interacting with school district and parent groups to promote positive outcomes
- Encouraging parent visits and involvement in decision making

-
- Keeping the community informed about school activities through newsletters, news releases, and attendance at parent meetings, etc.
 - Effectively utilizing community resources and volunteering to promote student learning

Decision Making and Problem Solving

- Considers research when making decisions
- Considers alternative and consequences in the decision making process
- Makes decisions in a timely fashion and maximizes decisions effectiveness by follow-up actions
- Clearly communicates decisions and rationale to all affected
- Seeks information from appropriate sources and strives for consensus in the decision making process
- Identifies problem areas and seeks solutions before crisis situations develop
- Effectively delegates decision making and problem solving to appropriate personnel
- Supports and endorses decision made by the President/CEO, Teachers, and administrative team in the operation of the school

Professional Development

- Keeps abreast of changes and developments in the profession by attending professional meetings, reading professional journals, and discussing problems of mutual interest with others in the field
- Assumes responsibility for his/her own professional growth and development through membership and participation in the affairs of professional organizations, through attendance at regional, state, and national meetings
- Plans and implements individualized improvement programs when necessary
- Effectively utilizes the expertise of school personnel, including self, in staff development
- Helps teachers implement objectives for themselves and students

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- Provides opportunities for teachers to share and demonstrate successful practices
 - Views self as a role model for expected staff behavior
 - Perceives self as a change agent; works for personal and professional organizational renewal

Qualifications:

- Montessori certificate and/or experience
- IN state certificate
- Minimum 4 years classroom teaching experience

Attachment 10

Other Staff

Montessori Academy Preparatory School (MAPS):
An Initiative of The Montessori Educational Charity

Assistant Teacher Job Description

Job Title: Assistant Teacher

Reports To: Lead Teacher

Summary: This position requires love, patience and respect for children, encourage the children to be independent and model for them appropriate manners and behaviors. Instruct children in activities designed to promote social, physical, and intellectual growth following the philosophies of Maria Montessori by performing the following duties:

Essential Duties and Responsibilities include the following:

- Adhere to company and safety policies and procedures
- Become knowledgeable with Montessori terminology and methods
- Assist the head teacher with providing the children with a “prepared environment”
- Assist with individual and/or group activities to stimulate growth of the children in social, emotional and academic areas
- Assist the children by moving around;
 - Complete different work cycles
 - Choosing work
 - Returning work when the child completes his task
- Encourage individual work time to promote independence as well as group work to promote socialization
- Be present at parent/teacher conference
- Establish and maintain cooperative working relationships with children, parents and co-workers
- Participate in all open houses and school programs
- Serve snack and lunch while helping children to learn how to help themselves
- Allow children to be as independent as possible
- Responsible for cleanliness of room
- Teach small group lessons

Education and/or Experience:

- **3-6:** High School Diploma or a general educational development certificate; bilingual (Spanish); A clear record through fingerprinting; Have the physical capacity to work with school aged children (includes but is not limited to: bending, minor lifting, working on the floor); CPR/First Aid certification
- **6-12:** Bachelor’s Degree, interest in pursuing state teaching certification and/or Montessori certification; A clear record through fingerprinting; Have the physical

capacity to work with school aged children (includes but is not limited to: bending, minor lifting, working on the floor); CPR/First Aid certification. Preferred qualifications: Bilingual (Spanish)

- **12-14:** Bachelor's Degree, at least 1 year experience working with adolescents or teaching; A clear record through fingerprinting; CPR/First Aid certification. Preferred qualifications: Bilingual (Spanish), State teaching certification or Montessori Adolescent certificate.

Montessori Academy Preparatory School (MAPS):
An Initiative of The Montessori Educational Charity

Director of Finance & Operations Job Description

Job Title: Director of Finance & Operations

Reports to: Principal The Montessori Educational Charity

Supervises: Administrative support staff, facilities staff, and technology staff

Position Summary: The Director of finance and operations (DFO) will oversee fiscal management, fundraising, compliance, technology, computerized student recordkeeping, facility management, and human resources related functions. The DFO will serve as a member of the senior management team and will report to the Principal.

Responsibilities:

Finance

- Fiscal management and reporting
- Oversee and monitor internal controls
- Manage all financial and compliance audits
- Negotiate all external contracts
- Prepare annual budgets
- Maintain relationships with third party vendors
- Select, implement and manage computerized accounting program
- Manage contracts and procurement
- Develop purchasing and other finance related policies and procedures
- Provide timely reports to the Principal and Board for fiscal planning, management and oversight

Human Resources

- Establish human resource functions for the organization
- Develop policies and procedures to human resources
- Manage payroll, benefits and human resources reporting

Operations

- Manage facilities
- Develop policies and procedures related operations
- Select, implement and manage computerized student record keeping program
- Manage day-to-day operations
- Hire, supervise and train all administrative support staff, facilities staff, technology staff

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- Serve as a member of the senior management team and assist in all strategic planning activities

Compliance

- Oversee compliance
- Serve as the school liaison
- Work with Campus Directors for all areas of administration and compliance
- Provide timely reports to the Principal and Board related to operations and compliance

Qualifications

- Masters in nonprofit management preferred, Bachelors required
- Knowledge of bookkeeping, financial reporting, GAAP, audits, budgeting and cash flow management
- Prior experience in compliance required
- Prior experience in a school setting preferred

Montessori Academy Preparatory School (MAPS):
An Initiative of The Montessori Educational Charity

Lead Teacher Job Description

Job Title: Lead Teacher

Reports To: Principal

Summary - This position requires love, patience and respect for children, encourage the children to be independent and model for them appropriate manners and behaviors. Maintain responsibility for the academic, social and emotional growth of all students in the classroom.

Essential Duties & Responsibilities include the following:
Other duties may be assigned.

Curriculum, Materials, and School Performances

- Establish and maintain Montessori classroom culture, paying particular attention to the needs of students/parents new to Montessori
- Implement and update curriculum as student needs dictate, and recommend expenditures on needed materials
- Plan, prepare, and maintain all units of study, lessons, and “works” – including obtaining and returning children’s library books
- Plan and prepare children and all materials needed to perform an annual classroom performance for school families
- Schedule all guest presenters and organize all field trips, including securing field trip drivers
- Give lessons when needed, observe student progress
- Meet weekly with each student to discuss progress and academic goals

Parent Education, Meetings, Conferences

- Communicate via newsletters with parents about their children’s school lives every 2 weeks
- Conduct or be responsible for implementing Parent Education nights during the school year
- Contact and meet with specialists and/or parents regarding children with special needs
- Prepare for and schedule 2-3 individual communications with all parents during the year- including 2 parent conferences, parent education and parent visitations
- Schedule and work with other teachers for any joint Parent Nights, programs/performances, and visitations
- Meet individually with prospective parents and students

- Schedule parent observations for prospective parents

Record-Keeping:

- Carefully observe and keep daily records on each student's individual progression through the classroom, always being available to offer gentle guidance
- Organize a record-keeping system for assistants regarding children's work
- Complete individual Montessori records including Parent Teacher
- Conference forms for all students for their permanent folders 2x/year
- Complete individual Work Sampling forms on students 2x/year in the Fall & Spring
- Complete Report Cards
- Keep a school calendar of events

Supervision of Classroom Assistants

- Advise the Principal on the hiring of classroom assistants, making sure an effective team/learning environment is created and maintained through careful oversight of/feedback to those assistants
- Attend weekly staff meetings
- Conduct all required in-service training within the first month of the opening of the school

Administration – Board, Volunteers, Building, Supplies, Scheduling

- Serve as the liaison for the classroom to the Principal paying particular attention to ensuring that the school policies on safety, school licensing requirements, staffing minimums, and Board policies for the school are adhered to
- Plan, prepare, and organize all materials for parent volunteers
- Ensure that the materials and classroom are clean, safe and maintained – (e.g. daily vacuuming and cleaning)
- Report any maintenance issues to the office manager
- Care for all classroom animals and plants
- Check and read school email at least 3 times per week – downloading and sharing professional articles with assistants
- Organize staff work days for changing out materials, cleaning, reorganizing works, and providing feedback and in-services as needed
- Be familiar with the Parent's Handbook and school policies

Qualifications: Lead Teacher must meet the following basic requirements:

- Bachelor's Degree
- Montessori certification and/or IN state teaching certificate
- If not both Montessori and State certified, willingness to pursue certification
- At least 1 year experience in a Montessori classroom at the age level (internship could be considered to meet this criteria)
- CPR/First Aid certification
- A clear record through fingerprinting
- Knowledge of IN Content Standards
- Have the physical capacity to work with school aged children (includes but is not limited to: bending, minor lifting, working on the floor)

Preferred Qualifications:

- Bilingual
- IN State and Montessori Certified, with endorsements in appropriate content area at the age level

Montessori Academy Preparatory School (MAPS):
An Initiative of The Montessori Educational Charity

SPED Teacher Job Description

Job Title: Special Education Teacher

Reports To: Principal

Summary - This position requires love, patience and respect for children, encourage the children to be independent and model appropriate manners and behaviors. Maintain responsibility for the academic, social and emotional growth of all students in the classroom.

Essential Duties & Responsibilities include the following:
Other duties may be assigned.

- Teacher to school SpEd students
- Provide direct services as needed to Special Needs students
- Obtain present levels/baselines at F2F (Face- to- Face)
- Follow up with providers to confirm IEP attendance, reports, and services are being completed
- Turn in notes from e-mails and calls at end of month to office and e-mail them to SpEd Master Teacher.
- Create rough draft of AP forms and send to Lead Teacher within timelines
- Mail Prior Notices to parents
- Scheduling IEPs, setting up meetings on the Internet, and following up on attendees
- Ensuring all documents are in prior to IEP meeting (psych report, DIS provider reports/goals, GE/Parent progress) and forwarded to MT for approval
- Mailing all approved reports to parents one week before IEP
- Complete academic testing for initials and tri-annuals and writing of reports and IEPs
- Obtaining signatures
- Holding transition meetings with high school staff
- Monitoring Confidential tracking spreadsheet for returned IEPs
- Follow up with parental or teacher concerns
- Working closely with SpEd Lead Teacher to alert any concerns
- Keeping files in office compliant
- Update SpEd database with accommodations, dates, and other relevant needed information
- Test students as needed during state testing
- Attend all Special Education meetings
- Attend trainings as needed
- Following up on concerns with teacher and/ or parent as noted on teacher monthly progress form
- Complete IEP Progress Reports for each student including DIS progress

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- Must be familiar with the Montessori curriculum
 - Support parents with student placement, curriculum, and instructional issues
 - Support parents with school set-up and logistics questions
 - Support parents and students with basic computer set-up, navigation, and troubleshooting
 - Respond as soon as possible but no later than 24 hours to parent inquiries via phone and/or e-mail during regular work week
 - Proactively track student academic progress and attendance on a daily basis
 - Conduct face-to-face meetings every 50 days or as needed with parents/responsible adults and students to assess each student's progress, learning style, and any other academic, social or developmental issues.
 - Conduct bimonthly conferences with parents/responsible adults to assess each student's progress, learning style, and any other academic, social, or developmental issues
 - Generate informal and formal reports based on conferences
 - Collect, review, and evaluate student work samples.
 - Grade and submit work in a professional and timely manner
 - Ensure compliance with state requirements
 - Proactively check on student progress and e-mail/call families whenever a warning sign emerges
 - Alert administrators of any concerns about student progress
 - Track and verify that attendance hours are being logged and correlate with number of lessons completed
 - Complete monthly attendance spreadsheets to be used for state attendance reporting
 - Make placement and promotion decisions
 - Process student change in placement, as needed
 - Write reports and assign grades for semester progress reports
 - Organize orientation, training, social, and educational activities for students and families, including community building activities such as school outings, service-learning opportunities, clubs and events
 - Take part in and utilize information from our discussion board
 - Participate in a weekly teacher conference call, as needed
 - Participate in regional professional developments
 - Work with the administration to prepare students for standardized tests (including the logistics of selecting testing sites)
 - Serve as proctors for site-based proctored exams
 - Utilize and test new technologies before families and students implement them
 - Participate in the school's self-evaluation program
 - Track the delivery and return of materials and computer equipment
 - Support school administrators with information sessions
 - Conduct parent trainings
 - Assist with various projects throughout the year with colleagues and administration, as needed

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- Travel regularly within and between assigned geographic areas to support students; attend regularly scheduled meetings; and participate in school activities, open houses, xPos; and Orientations
 - Other duties as required

Qualifications: SPED must meet the following basic requirements:

- Bachelor's Degree
- IN State Certification in Special Education
- Montessori certification a plus
- CPR/First Aid certification
- A clear record through fingerprinting
- Have the physical capacity to work with school aged children (includes but is not limited to: bending, minor lifting, working on the floor).

Preferred Qualifications:

- Bilingual (Spanish)

Attachment 11

1. 501(c)(3) Letter
2. Board Bylaws
3. Articles of
Incorporation

Bylaws of The Montessori Educational Charity: A Not-For-Profit Corporation

ARTICLE I NAME

The name of the Corporation shall be The Montessori Educational Charity (MEC). The MEC may elect to change its name by a vote of the membership body.

ARTICLE II PURPOSES

Section 1: Not-for-Profit. The MEC is organized and operated exclusively as a not-for-profit organization with educational purposes.

Section 2: Purpose. The MEC will provide Montessori education opportunities to students in alignment with state and national standards. This includes the operation of schools, programs, and other activities which advance this purpose.

Section 3: Rules. The following rules shall conclusively bind the MEC and all persons acting on its behalf:

(a) No part of the net earnings of the MEC shall inure to the benefit of or be distributable to its members, directors, officers, or other private persons, except that the MEC shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes set forth herein. No substantial part of the activities of the MEC shall be the carrying on of propaganda, or otherwise attempting to influence legislation. The MEC shall not participate in, or intervene in (including the publishing or distribution of statements) any political campaign on behalf of any candidate for public office.

(b) The MEC may be dissolved pursuant to the laws of the State of Indiana. Upon the dissolution of the MEC, the Board of Directors shall, after paying or making provision for the payment of all the liabilities of the MEC, dispose of all the assets of the MEC exclusively for the purposes of the MEC in such manner, or to such organization or organizations operated exclusively for educational purposes as shall at the time qualify as a not-for-profit organization or organizations. Any assets not so disposed of shall be disposed of by the Circuit Court of the county in which the principal office of the MEC is then located, exclusively for such purposes or to such organization or organizations, as said Court shall determine, which are organized and operated exclusively for such purposes.

(c) The MEC shall not adopt any practice, policy or procedure which would result in discrimination on any basis prohibited by federal, state, or local law.

ARTICLE III MEMBERSHIP

Section 1: The business of the MEC shall be managed by a Board of Directors consisting of at least five and not more than ten members, including the officers of this organization. At least one of the directors elected shall be a resident of the State of Indiana and a citizen of the United States. Other than the Principal, a Director cannot be an employee, student, parent, or any relative pertaining thereto of the MEC.

Section 2: Board of Directors Nomination, Election, and Tenure. The Executive Committee proposes candidates for members of the Board of Directors and to fill vacancies on the Board of Directors. Directors shall be elected during the annual meeting of the MEC in the same manner and style as the officers of the MEC, and they shall serve for a term of two (2) years. A system of staggered terms will be implemented (1/3, 1/3, 1/3) once the Board reaches full capacity.

Each Director may cast one (1) vote with respect to one (1) position or vacancy. An affirmative vote of two-thirds (2/3) of the Directors shall be required for election. A Director selected to fill a vacancy shall be elected for the unexpired term of his or her predecessor in office. Directors have no term limits, but they must be reaffirmed at the end of their term.

Section 3: Board of Directors Powers. The Board of Directors shall have the control and management of the affairs and business of this organization. The Board of Directors shall only act in the name of the organization when it shall be regularly convened by its President after due notice to all the directors of such meeting.

Section 4: Board of Directors Obligations. Each director must attend at least 90% of all meetings, participate in the MEC's fundraising efforts, and either serve on at least one committee as described herein.

Section 5: Vacancies. Vacancies in the Board of Directors shall be filled by a vote of the majority of the remaining members of the Board of Directors for the balance of the term.

Section 6: Removal. A director may be removed with or without cause. The removal process must begin by motion and approved by a two-thirds majority vote.

ARTICLE IV OFFICERS

Section 1: Officers. The MEC's officers shall include a President, Vice-President, Secretary, Treasurer and Principal. The Board of Directors may elect or appoint such other officers as it shall deem desirable.

Section 2: Election and Term of Office. Other than the Principal Board officers shall be elected by the Board of Directors from among its members for a two (2) year term. The officers shall be elected at any meeting of the Board of Directors and shall serve until their successors have been duly elected and have qualified. Vacancies may be filled or new offices created and filled at any meeting of the Board of Directors. The Principal will be selected by the Board of Directors.

Section 3: Removal. Any officer may be removed by the Board of Directors whenever, in its judgment, the best interests of the MEC would be served thereby.

Section 4: Vacancies. A vacancy in any office because of death, resignation, removal, disqualification, or otherwise may be filled by the Board of Directors for the unexpired portion of the term.

Section 5: President. The President shall be the principal governing officer of the MEC. He/She will preside at meetings of the Board of Directors.

Section 6: Vice- President. In the absence of the President or in the event of his or her death, inability, or refusal to act, the Vice-President, unless otherwise determined by the Board of Directors, shall perform the duties of the President and when so acting, shall have all the powers of and be subject to all the restrictions upon the President. The Vice-President shall perform such other duties as from time to time may be assigned to him or her by the President or Board of Directors.

Section 7: Secretary. The Secretary shall keep the minutes of the meetings of the Board of Directors and of all Executive Committees in one or more books provided for that purpose. He or she will also ensure that all notices are duly given in accordance with the provisions of these bylaws or as required by law, be the custodian of the corporate records and of the seal of the MEC, see that the seal of the MEC is affixed to all documents the execution of which on behalf of the MEC under its seal is duly authorized, and perform all duties incident to the office of Secretary and such other duties as from time to time may be assigned to him or her by the President or by the Board of Directors.

Section 8: Treasurer. The Treasurer shall have charge and custody of and be responsible for all funds and securities of the MEC, receive and give receipts for moneys due and payable to the MEC from any source whatsoever, and deposit all such moneys in the name of the MEC in such depositories as shall be selected in accordance with the provisions of these bylaws. The Treasurer will also perform all duties incident to the office of Treasurer and such other duties as

from time-to-time may be assigned to him by the President or by the Board of Directors, or by these bylaws

Section 9: Principal. The Principal shall be the principal executive officer of the MEC and shall supervise and control all of the business and affairs of the MEC. He or she is appointed by Board of Directors. He/She shall, when present, shall sign any deeds, mortgages, bonds, contracts, or other instruments which the Board of Directors has authorized to be executed, except in cases where the signing and execution thereof shall be expressly delegated by the Board of Directors or by these bylaws to some other officer or agent of the MEC, or shall be required by law to be otherwise signed or executed. He or she shall also perform all duties incident to the office of Principal and such other duties as they may be prescribed by the Board of Directors from time to time.

Section 10: Compensation. The following apply:

1. The Principal shall receive a salary in exchange for services provided in role served.
2. Officers (other than the Principal) will serve as volunteers unless the Board authorizes a change by amending these bylaws.
3. No Officer shall serve the MEC in any other capacity and receive compensation therefore unless such additional compensation be authorized by the Board of Directors.

ARTICLE V BOARD OF DIRECTORS MEETINGS

Section 1: Annual Membership Meeting. The MEC's Annual Membership Meeting shall be held on the third Monday of October each and every year except if such day be a legal holiday. In that event, the Board of Directors shall fix the day, but it shall not be more than two (2) weeks from the date fixed by these bylaws. All members are invited to attend.

Section 2: Regular Meetings. Regular meetings shall be held pursuant to a schedule of regular meetings which shall be established at the beginning of each school year and shall state the regular dates, times, and places of such meetings. Written notice stating the place, day, and hour of the meeting shall be delivered not less than 5 nor more than 60 days before the date of the meeting, or in the case of a removal of one or more directors, a merger, consolidation, dissolution or sale, lease, or exchange of assets not less than 20 nor more than 60 days before the date of the meeting, to each member of record entitled to vote at such meeting

Section 3: Special Meetings. Special meetings may be called by the Board President when he or she deems it for the best interest of the MEC. The majority of Board officers or the majority of Board members can also call for a special meeting. Notices of such meeting shall be provided to all Board members at least ten (10) days before the scheduled date set for such special meeting. Such notice shall state the reasons that such meeting has been called, the

business to be transacted at such meeting, and by whom it was called. No other business but that specified in the notice may be transacted at such a special meeting without the unanimous consent of all present at such meeting.

Section 4: Quorum. The presence of not less than fifty (50) percent of the Board of Directors shall constitute a quorum and shall be necessary to conduct the business of the MEC. A lesser percentage may adjourn the meeting for a period of not more than two (2) weeks from the date scheduled by these bylaws, and the Secretary shall cause a notice of this scheduled meeting to be sent to all those members who were not present at the meeting originally called. A quorum as herein before set forth shall be required at any adjourned meeting.

Section 5: Participation via Telecommunication. Members of the Board of Directors or of any committee of the Board of Directors may participate in and act at any meeting of such Board or committee through the use of telecommunications by means of which all persons participating in the meeting can hear each other. Participation in such a meeting shall constitute attendance and presence in person at the meeting of the person or persons so participating.

Section 6: Order of Business. The most recent edition of Robert's Rules of Order shall govern the proceedings of Director meetings to the extent consistent with these Bylaws.

Section 7: Voting. The following voting provisions apply to the MEC's meetings.

- (a) Each director shall have one vote. Such voting may not be done by proxy.
- (b) All votes shall be by voice during all meetings except for those meetings during which officers and directors are elected. For election of officers and directors, ballots shall be provided and there shall not appear any place on such ballot that might tend to indicate the person who cast such ballot.
- (c) Any action required to be taken at any meeting of the Board of Directors may be taken without a meeting if all the members entitled to vote with respect to the subject matter thereof consent to the action in writing. Such consents shall be treated for all purposes as a vote at a meeting.

Section 8: Open Meetings. All meetings shall be conducted in accordance with federal, state, and local laws governing open access, meeting publication notices, and other requirements.

ARTICLE VI COMMITTEES

Section 1: Executive Committee. The Executive Committee shall consist of the MEC's officers. The Executive Committee shall meet at such times and places as is deemed necessary by the Executive Committee, provided that the Executive Committee shall confer prior to any meeting of the Board of Directors to establish the agenda of such meeting. The President of the Board of Directors shall serve as President of the Executive Committee. But for the Principal, members of the Executive Committee shall not receive salaries for their services unless the Board votes to do so via bylaw amendment. Except as prohibited by law the Executive Committee shall be authorized to act on behalf of the Board of Directors in all matters requiring decisions arising between meetings of the Board of Directors. The Executive Committee shall report any action taken by it to the Board of Directors at its succeeding meeting.

Section 2: Committees of the Board of Directors. The Board of Directors, by resolution adopted by a majority of the Directors, may designate one (1) or more committees to address concerns common to the operation of a school, including (but not limited to) discipline, education, facilities, finance, personnel, and resource development/marketing.

(a) Each committee shall consist of at least two (2) or more members of the Board of Directors.

(b) Upon formation of a committee, the Board may grant it the authority to have and exercise the authority of the Board of Directors in management of specified duties of the MEC. However, the designation of such committees and the delegation thereto of authority shall not operate to relieve the Board of Directors, or any individual member of the Board of Directors, of any responsibility imposed upon them by law.

Section 3: Term of Office. Each member of a committee shall serve until replaced or is removed. Any member of any committee may be removed by the Board of Directors whenever in its judgment the best interests of the MEC shall be served by such removal.

Section 4: President. One member of each committee, other than the Executive Committee, shall be elected President of that committee by the members of that particular committee. The President of the MEC shall be the President of the Executive Committee.

Section 5: Nominations and Elections. Members of each committee shall usually be members of the Board of Directors, and a majority of each committee must be directors, except for such committees appointed by the board relating to the election or process of election of directors. However, non-Board members may serve as members of all committees, except the Executive Committee, if such non-Board members are nominated by the President of the committee and approved by the Board. .

Section 6: Vacancies. Vacancies in the membership of any committee may be filled by appointments made in the same manner as provided in the case of the original appointments.

Section 7: Quorum. Unless otherwise provided in the resolution of the Board of Directors designating a committee, a majority of the whole committee shall constitute a quorum,

and the act of a majority of the members present at a meeting at which a quorum is present shall be the act of the committee.

Section 8: Rules. Each committee may adopt rules for its own government not inconsistent with these bylaws or with rules adopted by the Board of Directors.

ARTICLE VII SCHOOL ADVISORY COUNCILS

Section 1: School Advisory Council Purpose. For every school operated by the MEC, the MEC will create a school advisory council. School advisory councils encourage collaboration between the Board of Directors, Principal, key staff members (management & teachers), community members, parents, and students.

(a) The Board of Directors must create a school advisory council at least sixty (60) days prior to opening a school. A school advisory council must exist as long as the MEC is legally mandated to operate a school.

Section 2: School Advisory Council Composition. A school advisory council will consist of at least five (5) and not more than fifteen (15) members composed of the Principal, a mix of key staff members (management & teachers), community members, parents, students, and other stakeholders.

Section 3: School Advisory Council President. The Principal serves as the school advisory council and representative during Board of Directors meetings, and he or she is responsible for conducting meetings pursuant to prevailing standards of order.

Section 4: School Advisory Council Nomination, Election, and Tenure. Members can serve a one-year term. A school advisory council can add or remove subsequent members at any time. Each school advisory council member may cast one (1) vote with respect to one (1) proposed position, vacancy, or removal. An affirmative vote of two-thirds (2/3) of the school advisory council Members shall be required for election. A member selected to fill a vacancy or removal shall be elected for the unexpired term of his or her predecessor in office.

Section 4: school advisory council Powers. The following provisions apply with respect to the school advisory council's powers:

(a) The school advisory council has powers to make decisions with respect to concerns of a non-governance, non-financial, or non-academic, nature (e.g. planning of student fundraisers, field trips, certain after-school programs, etc.). These decisions resulting from these expressed powers will be presented to the Board of Directors during its monthly meetings in the form of a notification/consent agenda which is prepared by the Principal or other school advisory council member the Principal delegates to do so. The Board of Directors may decide to discuss this notification/consent agenda and subsequently elect to address any issues or concerns resulting therefrom.

(b) The school advisory council can also discuss any concern not specifically within its realm of responsibility or powers and present its suggestions to the Board of Directors. The Board of Directors must address these concerns through a written explanation within fourteen (14) days.

Section 5: school advisory council Meetings. school advisory council meetings should meet the following standards:

(a) Regular meetings shall be held pursuant to a schedule of regular meetings which shall be established at the beginning of each academic year and shall state the regular dates, times, and places of such meetings. There should be at least one scheduled regular meeting each month.

(b) Special meetings may be called by the Principal when he or she deems it for the best interest of the school advisory council.

(c) The presence of not less than seventy-five (75%) percent of the school advisory council constitutes a quorum and shall be necessary to conduct business. A lesser percentage may adjourn the meeting for a period of not more than two (2) weeks from the date scheduled by these bylaws, and the Principal shall cause a notice of this scheduled meeting to be sent to all those members who were not present at the meeting originally called. A quorum as herein before set forth shall be required at any adjourned meeting.

(d) Members of the school advisory council can participate in and act through the use of a conference telephone or other communications equipment by means of which all persons participating in the meeting can hear each other. Participation in such a meeting shall constitute attendance and presence in person at the meeting of the person or persons so participating.

(e) The order of business for each meeting should include a roll call, review of minutes of the previous meeting, reports, old/unfinished business review, new business discussion, and adjournments.

(f) Each school advisory council has one vote. All votes shall be by voice during all meetings.

ARTICLE VIII

CONTRACTS, LOANS, CHECKS, DEPOSITS AND GIFTS

Section 1: Contracts. The Board of Directors may authorize any officer or agent or agents to enter into any contract or execute and deliver any instrument in the name of and on behalf of the MEC. Such authority may be general or confined to specific instances.

Section 2: Loans. No loans shall be contracted on behalf of the MEC, and no evidences of indebtedness shall be issued in its name unless authorized by a resolution of the Board of Directors. Such authority may be general or confined to specific instances.

Section 3: Checks and Drafts. All checks, drafts, or other orders for the payment of money, issued in the name of the MEC, shall be signed by such officer or agent of the MEC and in such manner as shall from time-to-time be determined by resolution of the Board of Directors. In the absence of such resolution, such instruments shall be signed by the Treasurer and countersigned by any one (1) Board Officer.

Section 4: Deposits. All funds of the MEC not otherwise employed shall be deposited to the credit of the MEC in such depositories as the Board of Directors may select.

Section 5: Gifts. The Board of Directors may accept, on behalf of the MEC, any contribution, gift, or bequest for the general purpose or for any special purposes of the MEC.

ARTICLE IX GENERAL PROVISIONS

Section 1: Registered Office and Agent. The MEC shall have and continuously maintain in the State of Indiana a registered office and a registered agent, and such other registered agents as the Board of Directors may determine.

Section 2: Seal. The Board of Directors shall provide a Corporate seal pursuant to applicable federal, state or local laws.

Section 3: Conflict of Interest. No member of the Board of Directors shall vote on any matter or transaction concerning any individual or entity with which such director has, or within the twelve-month period preceding the vote, had any substantial ownership, employment, fiduciary, contractual, or creditor relationship (any such matter or transaction is hereinafter referred to as a "Conflict"). Each director shall disclose in writing all Conflicts to the Board of Directors prior to the discussion of the underlying matter or transaction by the Board of Directors and shall draw to the attention of the Board of Directors such Conflict at any subsequent meeting at which such matter of transaction is discussed. Following such disclosure, a director shall be entitled to take part in the discussions of the Board of Directors concerning such matter or transaction and shall be considered in determining whether a quorum is present, but shall not be entitled to vote on the applicable manner or transaction. The question of whether a Conflict exists shall, in the absence of certainty, be determined by the vote of a majority of disinterested directors present at the meeting called for a purpose of discussing the transaction or matter to which the Conflict relates.

Section 4: Fiscal Year. The fiscal year of the MEC shall be fixed by the Board of Directors.

Section 5: Books and Records. The MEC shall keep correct and complete books, records, and minutes of the proceedings of the Board of Directors and committees having any of the authority of the Board of Directors. The books, records, and papers of the MEC shall be subject to inspection by any director. The articles of incorporation and the bylaws of the MEC shall be available for inspection by any member at the principal office of the MEC.

Section 6: Indemnification. The MEC shall indemnify all officers and members of the Board of Directors, Executive Committee, and Committees of the MEC to the fullest extent of the law. The MEC shall be entitled to purchase insurance for such indemnification to the full extent as determined by the Board of Directors of the MEC.

Section 7: Exoneration and Bond. The following provisions apply:

(a) No person acting as a Director hereof shall be required, compelled, or be under any duty to examine, verify, question, or audit the books, records, or accounts of any preceding Director or Board of Directors.

(b) No person named herein or acting hereunder as a director hereof shall be required to give bond as such. If bond shall nevertheless be required for any reason, the cost thereof shall be paid by the MEC.

(c) No person acting as a director hereof shall at any time be held liable for any mistake of law or fact, errors of judgment, or for any loss coming to the MEC or any beneficiary hereof whatsoever, excepting only through actual fraud or willful and intentional misconduct on the part of the director to be charged. To the extent permitted by law, the MEC hereby agrees to defend, indemnify, and hold each director harmless from any and all expenses, costs, damages, loss, or other liability arising out of any act or omission in connection with the administration of the MEC, except with respect to actual fraud or willful and intentional misconduct of such director.

(d) In every case any additional, alternate, or successor director shall have all and the same respective powers, discretion, duties, rights and immunities and emoluments as the directors originally named herein.

Section 8: Amendments. Except as otherwise provided herein, these bylaws or the MEC's articles of incorporation may be amended or repealed and new bylaws (or amended articles of incorporation) may be adopted by the affirmative vote of two-thirds of the directors then holding office at any regular or special meeting of the Board of Directors at which a quorum is present, provided that at least ten (10) days written notice is given of intention to alter, amend, repeal, or adopt new bylaws (or articles of incorporation) at such meeting.

Section 9: Waiver. Whenever any notice is required to be given under the provisions of federal, state, and local law as well under the provisions of the Articles of Incorporation or of the Bylaws of the MEC, a waiver thereof in writing signed by the person or persons entitled to such notice, whether before or after the time stated therein, shall be deemed equivalent to the

giving of such notice. Attendance at any meeting shall constitute waiver of notice thereof unless the person at the meeting objects to the holding of the meeting because proper notice was not given.

Ratified: January 25, 2019

INTERNAL REVENUE SERVICE
P. O. BOX 2508
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: JUL 11 2007

THE MONTESSORI EDUCATIONAL CHARITY
INC
7507 N MICHIGAN RD
INDIANAPOLIS, IN 46268

Employer Identification Number:
20-8022211
DLN:
17053031017007
Contact Person:
DONNA ELLIOT-MOORE ID# 50304
Contact Telephone Number:
(877) 829-5500
Accounting Period Ending:
December 31
Public Charity Status:
170(b)(1)(A)(vi)
Form 990 Required:
Yes
Effective Date of Exemption:
December 12, 2006
Contribution Deductibility:
Yes
Advance Ruling Ending Date:
December 31, 2010

Dear Applicant:

We are pleased to inform you that upon review of your application for tax exempt status we have determined that you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code. Contributions to you are deductible under section 170 of the Code. You are also qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Code. Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.

Organizations exempt under section 501(c)(3) of the Code are further classified as either public charities or private foundations. During your advance ruling period, you will be treated as a public charity. Your advance ruling period begins with the effective date of your exemption and ends with advance ruling ending date shown in the heading of the letter.

Shortly before the end of your advance ruling period, we will send you Form 8734, Support Schedule for Advance Ruling Period. You will have 90 days after the end of your advance ruling period to return the completed form. We will then notify you, in writing, about your public charity status.

Please see enclosed Information for Exempt Organizations Under Section 501(c)(3) for some helpful information about your responsibilities as an exempt organization.

Letter 1045 (DO/CG)

State of Indiana
Office of the Secretary of State

Certified Copies

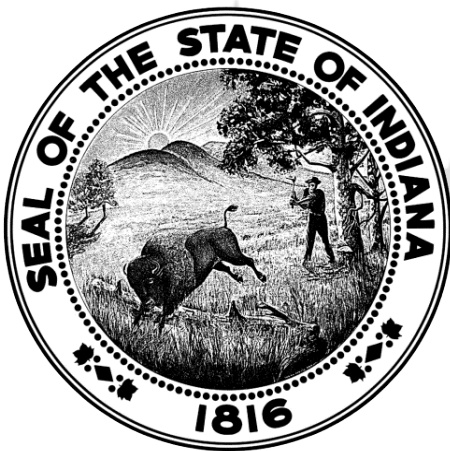
To Whom These Presents Come, Greeting:

I, CONNIE LAWSON, Secretary of State of Indiana, do hereby certify that I am, by virtue of the laws of the State of Indiana, the custodian of the corporate records and the proper official to execute this certificate.

I further certify that this is a true and complete copy of this 6 page document consisting of the following records filed in this office:

Certification Date: October 02, 2018
Business Name: THE MONTESSORI EDUCATIONAL CHARITY INC.
Business ID: 2006120800297

Transaction	Date Filed	No. of pages
Articles of Incorporation	12/07/2006	3
Articles of Amendment	02/18/2010	3
Total No. of pages		6



In Witness Whereof, I have caused to be affixed my signature and the seal of the State of Indiana, at the City of Indianapolis, October 02, 2018

Connie Lawson

CONNIE LAWSON
SECRETARY OF STATE

2006120800297 / 10589049

All certificates should be validated here: <https://bsd.sos.in.gov/ValidateCertificate>
Expires on November 01, 2018.

State of Indiana
Office of the Secretary of State

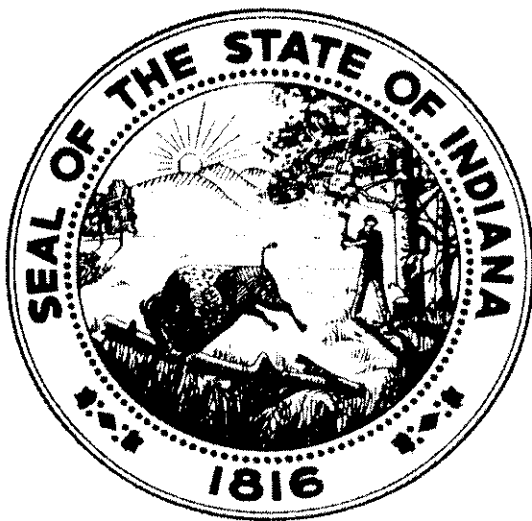
CERTIFICATE OF INCORPORATION

of

THE MONTESSORI EDUCATIONAL CHARITY INC.

I, TODD ROKITA, Secretary of State of Indiana, hereby certify that Articles of Incorporation of the above Non-Profit Domestic Corporation have been presented to me at my office, accompanied by the fees prescribed by law and that the documentation presented conforms to law as prescribed by the provisions of the Indiana Nonprofit Corporation Act of 1991.

NOW, THEREFORE, with this document I certify that said transaction will become effective Thursday, December 07, 2006.



In Witness Whereof, I have caused to be affixed my signature and the seal of the State of Indiana, at the City of Indianapolis, December 7, 2006.

A handwritten signature in black ink that reads "Todd Rokita".

TODD ROKITA,
SECRETARY OF STATE

2006120800297 / 2006120807962

2006120800297



ARTICLES OF INCORPORATION FOR A NONPROFIT CORPORATION

State Form 4162 (R1 0 / 1-03) Corporate Form No. 364-1 (October 1984)

Approved by State Board of Accounts 1995

TODD ROKITA
SECRETARY OF STATE
CORPORATIONS DIVISION
302 W. Washington St., Rm. E018
Indianapolis, IN 46204
Telephone: (317)232-6576

NOTES.

1. Nonprofit corporations must qualify with the Internal Revenue Service and the Indiana Revenue. It is strongly suggested you do not complete or file this form before contacting both agencies.
2. Article VII must be completed appropriately. Please see (1) above.

Indiana Code 23-17-3-2

FILING FEE: \$30.00

Indiana Secretary of State

Packet: 2006120800297

Filing Date: 12/07/2006

Effective Date: 12/07/2006

INSTRUCTIONS. 1. Use 8 1/2"x 1 1" white paper for attachments.

2. Present original and one (1) copy to the address in the upper right corner of this form.

3. Please type or print.

4. Please visit our office on the web at www.sos.in.gov.

ARTICLES OF INCORPORATION

The undersigned incorporator or incorporators, desiring to form a corporation (hereinafter referred to as the "Corporation") pursuant to the provisions of the Indiana Nonprofit Corporation Act of 1991 (hereinafter referred to as the "Act"), execute the following Articles of Incorporation.

ARTICLE I - Name and Principal Office

Name of the Corporation: (the name must include the word "Corporation", "Incorporated", "Limited", "Company" or one of the abbreviations thereof):

The Montessori Educational Charity Inc.

Principal Office: The address of the principal office of the Corporation is:

Post office address	City	State	ZIP code
7507 N. Michigan Road	Indianapolis	Indiana	46268

ARTICLE II - Purpose (optional)

The Mission of The Montessori Educational Charity Inc. is to use authentic Montessori educational methods to educate children and create competent, responsible and independent citizens who are innovative problem solvers. In partnership with teachers and parents, children are able to attain high levels of academic, personal and social achievements to become prepared constructive contributors to our community.

ARTICLE III - Type of Corporation (check only one)

The Corporation is a:

- ☒ public benefit corporation, which is organized for a public or charitable purpose;
- ☐ religious corporation, which is organized primarily or exclusively for religious purposes; or
- ☐ mutual benefit corporation (all others).

ARTICLE IV - Registered Agent and Registered Office

Registered Agent: The name and street address of the Corporation's Registered Agent and Registered Office for service of process are:

Name of Registered Agent

Vivian Cain

Address of Registered Office (street or building)	City	State	ZIP code
7507 N. Michigan Road	Indianapolis	Indiana	46268

ARTICLE V - Membership

Indicate if Corporation will have members:

☐ Yes ☒ No

(Continued on the reverse side)

ARTICLE VI - Incorporator(s)

Name(s) and address(es) of the incorporator(s) is/are as follows:

Name	Number and Street or Building	City	State	ZIP code
Vivian Cain	7507 N. Michigan Road	Indianapolis	IN	46268
Cecil Cain	7507 N. Michigan Road	Indianapolis	IN	46268

ARTICLE VII - Distribution of Assets on Dissolution or Final Liquidation

Refer to Indiana Code 23-17-22-5 for permitted activities following Dissolution.

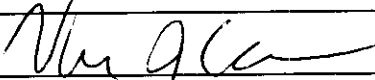

Upon dissolution of the corporation, assets shall be distributed for one or more exempt purposes within the meaning of sections 501 C 3 of the internal Revenue Code, or the corresponding sections of any future federal tax Code, or shall be distributed to the federal government for public purposes. Any such assets not so Disposed of shall be disposed of by a court of Competent jurisdictions of the county in which the principal Office of the corporation is then located, exclusively for such purposes or to such organization or organizations. As said Court shall determine, which are organized and operated exclusively for such purposes.

Indiana Secretary of State
 Packet: 2006120800297
 Filing Date: 12/07/2006
 Effective Date: 12/07/2006

* Please note this section must be completed.

THIS DOCUMENT MUST BE SIGNED BY ALL INCORPORATORS.

In witness whereof, the undersigned incorporator(s) of said Corporation execute(s) this document, and verify(ies) subject to penalties of perjury that the facts contained herein and true this Thursday day of December 7 2006

Signature 	Printed name Vivian Cain
Signature 	Printed name Cecil Cain
Signature	Printed name

This instrument was prepared by: (name)

Address	City	State	ZIP code
Bill Campbell	Indianapolis	IN	46208

Indiana Secretary of State
Packet: 2006120800297
Filing Date: 02/18/2010
Effective Date: 02/18/2010

RECEIVED
CORPORATIONS DIV.
10 FEB 18 PM 1:08

WMD
APPROVED
AND
FILED
TODD ROKITA
IND. SECRETARY OF STATE



**ARTICLES OF AMENDMENT OF THE
ARTICLES OF ORGANIZATION**

State Form 49460 (R / 1-03)
Approved by State Board of Accounts 1999

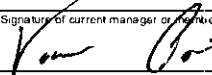
TODD ROKITA
SECRETARY OF STATE
CORPORATIONS DIVISION
302 W. Washington St., Rm. E018
Indianapolis, IN 46204
Telephone: (317) 232-6576

INSTRUCTIONS: Use 8 1/2" x 11" white paper for attachments.
Present original and one copy to the address in upper right corner of this form.
Please TYPE or PRINT.
Please visit our office on the web at www.sos.in.gov.

Indiana Code 23-18-2-5
Filing Fee: \$30.00

ARTICLES OF AMENDMENT OF THE ARTICLES OF ORGANIZATION OF:	
Name of Limited Liability Company The Montessori Educational Charity INC.	Date of Organization 12.07.2006
The undersigned manager or member of the above referenced Limited Liability Company (hereinafter referred to as the "LLC") existing pursuant to the provisions of: <i>Indiana Business Flexibility Act</i> as amended (hereinafter referred to as the "Act"), desiring to give notice of action effectuating amendment of certain provisions of its Articles of Organization, certifies the following facts:	
ARTICLE I Amendment(s)	
The exact text of Article(s) VII of the Articles of Organization is now as follows:	
<p><i>Article VII. Dissolution of Association and Distribution of Assets</i></p> <p>Refer to Indiana Code 23-17-22-5 for permitted activities following Dissolution.</p> <p>This corporation is organized exclusively for charitable, religious, educational, and scientific purposes, including, for such purposes, the making of distributions to organizations that qualify as exempt organizations under section 501(c)(3) of the Internal Revenue Code, or the corresponding section of any future federal tax code.</p> <p>Notwithstanding any other provisions of these articles, this organization shall not carry on any activities not permitted to be carried on by an organization exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code of 1986 or the corresponding provision of any future United States Internal Revenue law.</p> <p>No part of the net earnings of the organization shall inure to the benefit of, or be distributable to its members, trustees, officers, or other private persons, except that the organization shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purpose set forth in the purpose clause hereof. No substantial part of the activities of the organization shall be the carrying on of propaganda, or otherwise attempting to influence legislation, and the organization shall not participate in, or intervene in (including the publishing or distribution of statements) any political campaign on behalf of any candidate for public office.</p> <p>Upon the dissolution of the organization, assets shall be distributed for one or more exempt purposes within the meaning of section 501(c)(3) of the Internal Revenue Code of 1986, or corresponding section of any future Federal tax code, or shall be distributed to the Federal, state, or local government for a public purpose. Any such assets not so disposed of shall be disposed of by a court of competent jurisdiction of the county in which the principal office of the organization is then located, exclusively for such purposes.</p>	
* Please note this section must be completed	
ARTICLE II	
Date of each amendment's adoption: 2-15-2010	

(Continued on the reverse side)

ARTICLE III Compliance with Legal Requirements	
The manner of the adoption of the Articles of Amendment constitute full legal compliance with the provisions of the Act, and the Articles of Organization.	
I hereby verify, subject to the penalties of perjury, that the statements contained herein are true, this <u>15TH</u> day of <u>February</u> , 2010.	
Signature of current manager or member of LLC 	Printed name of manager or member <u>Vivian Cain</u>
Signature's title <u>/founder</u>	

**State of Indiana
Office of the Secretary of State**

CERTIFICATE OF AMENDMENT

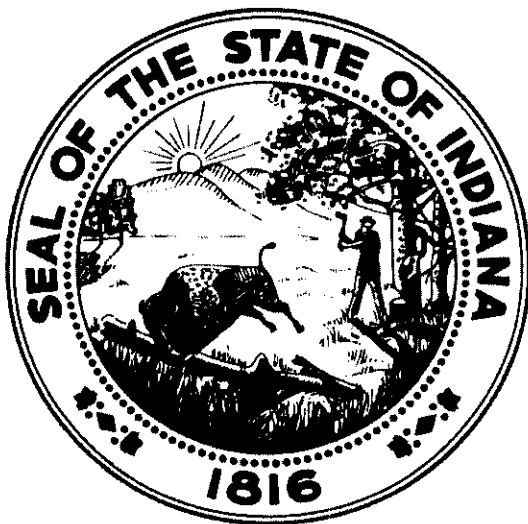
of

THE MONTESSORI EDUCATIONAL CHARITY INC.

I, TODD ROKITA, Secretary of State of Indiana, hereby certify that Articles of Amendment of the above Non-Profit Domestic Corporation have been presented to me at my office, accompanied by the fees prescribed by law and that the documentation presented conforms to law as prescribed by the provisions of the Indiana Nonprofit Corporation Act of 1991.

Indiana Secretary of State
Packet: 2006120800297
Filing Date: 02/18/2010
Effective Date: 02/18/2010

NOW, THEREFORE, with this document I certify that said transaction will become effective Thursday, February 18, 2010.



In Witness Whereof, I have caused to be affixed my signature and the seal of the State of Indiana, at the City of Indianapolis, February 18, 2010.

A handwritten signature in black ink that reads "Todd Rokita".

TODD ROKITA,
SECRETARY OF STATE

2006120800297 / 2010021975449

Attachment 12:

Statement of Assurances

Statement of Assurances

The charter school (Organizer) agrees to comply to all of the following provisions: (*Read and check*)

- ☒ 1. A resolution or motion has been adopted by the charter school Organizer's governing body that authorizes the submission of this application, including all understanding and assurances contained herein, directing and authorizing the Organizer's designated representative to act in connection with the application and to provide such additional information as required.
- ☒ 2. Organizer operates (or will operate if not yet open) a charter school in compliance with all federal and state laws, including the Indiana Charter Schools Law as described in all relevant sections of IC § 20-24.
- ☒ 3. Organizer will comply with the Open Door Law as described in IC § 5-14-1.5.
- ☒ 4. Organizer will, for the life of the charter, participate in all data reporting and evaluation activities as required by Ball State University (BSU) and the Indiana Department of Education. See in particular IC § 20-20-8-3 and relevant sections of IC § 20-24.
- ☒ 5. Organizer will comply with all relevant federal laws including, but not limited to, the *Age Discrimination in Employment Act* of 1975, Title VI of the *Civil Rights Act* of 1964, Title IX of the *Education Amendments of 1972*, section 504 of the *Rehabilitation Act* of 1973, Part B of the *Individuals with Disabilities Education Act*, and section 427 of the *General Education Provision Act*.
- ☒ 6. Organizer will comply with all provisions of the Non regulatory Guidance—Public Charter Schools Program of the U.S. Department of Education, which includes the use of a lottery for enrollment if the charter school is oversubscribed, as well as with applicable Indiana law. See also relevant sections of IC § 20-24.
- ☒ 7. Organizer shall ensure that a student's records, and, if applicable, a student's individualized education program as defined at 20 U.S.C. § 1401(14) of the *Individuals with Disabilities Education Act*, will follow the student, in accordance with applicable federal and state law.
- ☒ 8. Organizer will comply with all provisions of the *No Child Left Behind Act*, including but not limited to, provisions on school prayer, the Boy Scouts of America Equal Access Act, the Armed

Forces Recruiter Access to Students and Student Recruiting Information, the Unsafe School Choice Option, the Family Educational Rights and Privacy Act (FERPA) and assessments.

- ☒ 9. Organizer shall maintain accounting records and other evidence pertaining to costs incurred, with the provision that the records shall be kept available by the grantee during the grant period and thereafter for five full years from the date of final payment. BSU must be permitted to audit, review, and inspect the grantee's activities, books, documents, papers and other records relating to the expenditures of grant proceeds. The Organizer further agrees to comply with all federal and state audit requirements and ensures that arrangements have been made to finance those mandatory audits
- ☒ 10. Organizer will at all times maintain all necessary and appropriate insurance coverage.
- ☒ 11. Organizer will maintain compliance with all applicable BSU policies, including the BSU Policy Regarding Organizer Governance.
- ☒ 12. Organizer is required to keep and maintain all equipment purchased with grant funds in accordance with federal law and regulation.
- ☒ 13. Organizer will comply with the federal McKinney-Vento Homeless Assistance Act, 42 USC 11431, for homeless students, as well as the Individuals with Disabilities Education Act and 511 IAC 7-43-1(u), if and as applicable.
- ☒ 14. Organizer understands that if any findings of misuse of funds are discovered the said funds must be returned to the Indiana Department of Education, and BSU may revoke the charter if it deems that the recipient is not fulfilling the academic goals and fiscal management outlined in the charter.
- ☒ 15. Organizer will indemnify and hold harmless BSU, the Indiana Department of Education, the State of Indiana, all school corporations providing funds to the charter school (if applicable), and their officers, directors, agents and employees, and any successors and assigns from any and all liability, cause of action, or other injury or damage in any way relating to the charter school or its operation.

Signature

I, the undersigned, do hereby agree to the assurances contained above.

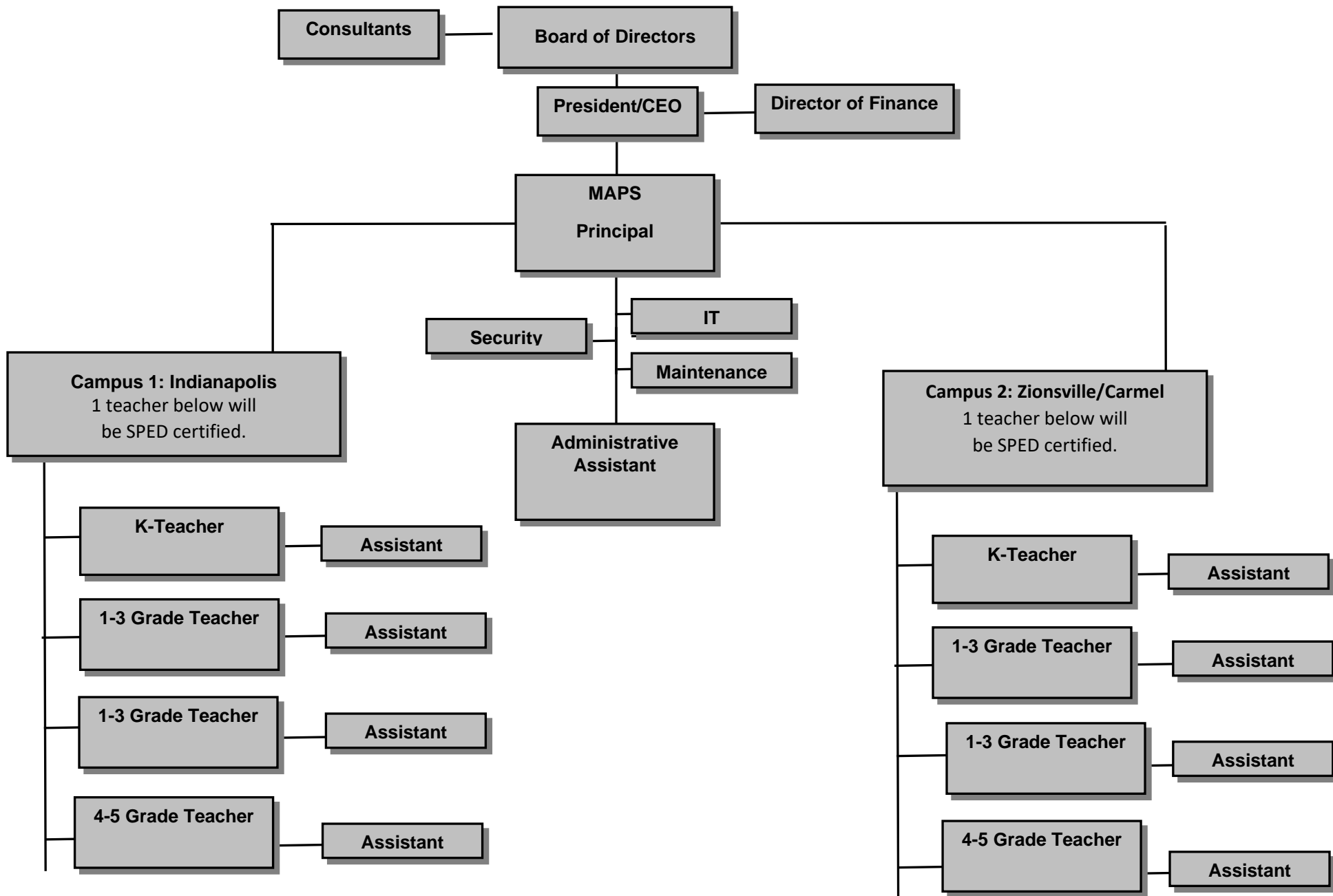
Signature of Charter School Organizer Authorized Representative

Date

Vivian Can

1/31/19

Attachment 13: MAPS Organizational Chart: 2020 - 2025



Attachment 14
Board Member
Information Sheets

Charter School Board Member Information Form

(To be completed individually by each proposed charter school board member. All forms must be signed by hand.)

Serving on a public charter school board is a position of public trust and fiduciary responsibility. As a board member of a public school, you are responsible for ensuring the quality of the school program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, BSU requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the applicant team behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

Background

1. Name of charter school on whose Board of Directors you intend to serve:

Montessori Academy Preparatory School (MAPS)

2. Full name: Vivian Cain

Home Address: 4729 Orlando Court, Indianapolis, IN 46228.

Business Name and Address: Maria Montessori International Academies

Telephone No.: 317-627-5555

E-mail address: vivian@inmontessori.com

3. Brief educational and employment history. (No narrative response is required if resume and professional biography are attached to the application)

☒ Resume and professional biography are provided.

4. Indicate whether you currently or have previously served on a board of a school district, another charter school, a non-public school or any not-for-profit corporation.

☐ Does not apply to me. ☒ Yes

5. Why do you wish to serve on the board of the proposed charter school?

I am a lifelong Montessori educator, and I believe in the potential of charter schools to advance educational outcomes.

6. What is your understanding of the appropriate role of a public charter school board member?

Board members have a duty of care, loyalty, and obedience. A charter board pursues this along the lines of academic improvement, financial management, and governance which facilitate goals and outcomes.

7. Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.

In addition to founding the MEC, I have served on Board the Greater Indianapolis Neighborhood Initiative (GINI) project with the CDC to represent Maria Montessori International Academy as community support to my community in Crooked Creek . The focus was to make my community more livable and improve the quality of life for all by focusing in five areas: 1) Commercial revitalization, 2) Residential neighborhood revitalization, 3) Infrastructure improvement, 4) Increased collaboration among human service providers, and 5) Continued community engagement in fulfilling the vision for Crooked Creek. As a result of the community involvement, new sidewalks were put along the Michigan Road Corridor for 5 miles, new stop lights were installed, bus stops with coverages were built, and community trash can were dispersed along Michigan Road to help Keep Michigan Road beautiful.

8. Describe the specific knowledge and experience that you would bring to the board.

I would bring business acumen, staff development, and Montessori education in leadership and instruction.

School Mission and Program

1. What is your understanding of the school's mission and guiding beliefs?

Mission and guiding beliefs are founded in a Montessori model which positions children for lifelong success.

2. What is your understanding of the school's proposed educational program?

It is a Montessori program which provides STEAM programming.

3. What do you believe to be the characteristics of a successful school?

Characteristics of a successful school include a great school culture, accountability, and financial stability.

4. How will you know that the school is succeeding (or not) in its mission?

Pursuant to benchmarks established and pursued.

Governance

1. **Describe the role that the board will play in the school's operation.**

The board is responsible for ensuring that the school pursues its mission. It does so in a governance capacity.

2. **How will you know if the school is successful at the end of the first year of operation?**

Student achievement, safety, and cultural milestones are met.

3. **How will you know at the end of four years if the school is successful?**

Same as above - but with students also being ready for middle school.

4. **What specific steps do you think the charter school board will need to take to ensure that the school is successful?**

Steps include following incubation guidelines, facility preparation, teacher hiring, recruitment, and lottery.

5. **How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interests of the school?**

Utilize committee structure and discipline policy.

Disclosures

1. **Indicate whether you or your spouse knows the other prospective board members for the proposed school. If so, please indicate the precise nature of your relationship.**

☒ I / we do not know any such trustees. ☐ Yes

2. **Indicate whether you or your spouse knows any person who is, or has been in the last two years, a school employee. If so, indicate the precise nature of your relationship.**

☒ I / we do not know any such employees. ☐ Yes

3. **Indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the charter school (whether as an individual or as a director, officer, employee or agent of some entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the school.**

☒ I / we do not know any such persons. ☐ Yes

4. **Indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the school. If so, indicate the precise nature of the business that is being or will be conducted.**

☐ I / we do not anticipate conducting any such business. ☒ Yes

I am the majority owner of the corporate entity in which MAPS will be housed. I have dedicated my life to Montessori education, so I have developed prepared environments in which Montessori education can be best expressed. Thus, I will offer my site for MAPS programming via lease.

5. **If the school intends to contract with an education service provider or management organization, indicate whether you or your spouse knows any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship.**

☒ Not applicable because the school does not intend to contract with an education service provider or school management organization.

☐ I / we do not know any such persons. ☐ Yes

6. **If the school intends to contract with an education service provider, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, contractual or management interest in the provider. For any interest indicated, provide a detailed description.**

☒ N/A ☐ I / we have no such interest. ☐ Yes

7. **If the school plans to contract with an education service provider, indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, indicate the precise nature of the business that is being or will be conducted.**

☒ N/A ☐ I / we or my family do not anticipate conducting any such business. ☐ Yes

8. **Indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.**

☒ Does not apply to me, my spouse or family. ☐ Yes

9. **Indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you serve on the school's board.** ☐ None ☒ Yes

There are no conflicts but for the fact I am the owner of the building which will house both MAPS campuses. That said, this lease process is transparent and open. In addition, the lease reflects prevailing market rates.

Certification

I, Vivian Cain, certify to the best of my knowledge and ability that the information I am providing to the Ball State University Office of Charter Schools as a prospective board member for MAPS Charter School is true and correct in every respect.

Vivian Cain

Signature

1/31/19

Date

Background:

1. Name of charter school on whose Board of Directors you intend to serve:

Maria Montessori International Academy.

2. Full name:

Jonathan Michael Kroenke

Home Address:

8002 states bend Dr, Indianapolis, IN 46239.

Business Name and Address:

Availity – 510 E 96th St #400, Indianapolis, IN, 46240.

Telephone No.:

© 317-474-5751

E-mail address:

Jkroenke@iupui.edu

5. Why do you wish to serve on the board of the proposed charter school?

I am excited for the opportunity to help reform the current education system. I believe the Montessori Method of education better prepares kids for the future they will be facing. I want to help this school succeed so that the children of the future are better prepared for the road ahead. I believe it's a huge improvement over the typical style of education. As opposed to teaching children that learning is only about receiving a certain grade, they get to stay open and curious to learning. I believe the grading system in most schools has instilled a sense of fear and failure in kids before they even had a chance to understand how fun and fulfilling learning can be in their lives.

6. What is your understanding of the appropriate role of a public charter school board member?

I believe my role is to help provide the strategic vision for the school as well as creating a path towards financial success. My role specifically would be focused on the financial success of the school. I would help create a budget for the school that aligns with its current strategy as well as report the financials to the board. I also believe a huge component of this position is to help explain and translate the financials to the rest of the board members so that they can understand our current financial position.

7. Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.

I currently have no direct experience serving on a school's board. There are multiple reasons I believe I would have the capability to be an effective board member. My whole life I have been surrounded by people in the education system. My mother has her master's in special education, my Father teaches medical school at IU School of Medicine and my fiancé is currently a teacher at break-o-day elementary. I have seen the issues that school's face my entire life and have always wanted to help fix the current education system. I also believe this will give me access to many mentors throughout my time as a school board member. I can utilize them to figure out the problems their schools have faced and use them to improve the charter school. Also, through my work experience I have had multiple opportunities to create budgets and present them to people with little to no experience with financial statements.

8. Describe the specific knowledge and experience that you would bring to the board.

In my positions I have had the great experience of relaying complex accounting information to multiple teams that have no idea what this information means. I am amazing at condensing and

conveying complex information in a short period of time. I have also created multiple budgets for a myriad of companies throughout my career. I also have years of experience helping companies track their income and expenses and finding solutions to lowering expenses and/or increasing income. Finally I am amazing at teaching myself new information on the fly, which means any skills or knowledge that I need to possess for this position that I may not currently hold, I will be able to learn in a short period of time.

School Mission and Program:

1. What is your understanding of the school's mission and guiding beliefs?

"Encouraging Imagination, exploration, and innovation at every age!"

2. What is your understanding of the school's proposed educational program?

The children are provided an environment to learn and grow. They then get to use their individual and unique skillsets to find an area of study they find most intriguing and are allowed to grow and learn at their own pace. I also know there are different age rooms in each classroom as opposed to everyone being the same exact age. This more reflects the real world. The students are allowed to learn through working with concepts and materials as opposed to being told exactly what to do. It ignites their curiosity as opposed to forcing them to achieve a certain grade.

3. What do you believe to be the characteristics of a successful school?

First and foremost I believe a school's success depends on the success and happiness of the children that attend it. If the kid's are miserable and/or failing the rest does not matter. The next in terms of importance is that the school is profitable. If a school is profitable it can reinvest the money back into furthering the education of its teachers and provide them with the correct supplies for their classrooms. Finally I believe it's important that the school has a good relationship with its community. This all occurs after a school has created an environment of communication and collaboration between the teachers, the administration and the board. I believe in being open and honest with all communications.

4. How will you know that the school is succeeding (or not) in its mission?

We can discuss how well the students are performing and whether or not they seem excited to learn as opposed to being forced to learn. Next I will have insight to the financials of the school so I will know what changes may need to be made financially. Finally I will push the school towards events that reach out to its surrounding community and get feedback from the parents. I believe it's extremely important to get feedback from the parent's and the teachers to see how well the school is doing.

Governance

1. Describe the role that the board will play in the school's operation.

First and foremost I believe the role the school board play in the school's operation is helping create and maintain the school's mission. Whether this mean's making sure the school is profitable or helping create new policies so that teachers feel more empowered to teach their kids, it's up to the school board to help focus the school on its mission.

2. How will you know if the school is successful at the end of the first year of operation?

Honestly in my own opinion, the first year will be successful if the doors are still open and enrollment rates have increased. The first year will be all about putting processes in place and creating a name for ourselves as a place for children to learn and grow. The first year is a learning year thus financial return is not of the upmost importance in the first year. It will also be successful if the parents state that the school has helped their children grow and learn.

3. How will you know at the end of four years if the school is successful?

At the end of four years I believe the school will be a success if it's making enough money to re-invest into its teachers and supplies as well as offering events that can help out the parents and the community. Obviously it's still extremely important at this point that the students are doing well and the community still holds the school in high respect, but the main difference I see in year four as opposed to year one is that the school should be in better financial standings.

4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?

First and foremost you have to create a mission and a set of goals that everyone truly believes in. You have to get the people to believe in the mission they are working towards. Second I would like to utilize social media to spread awareness of the school and its achievements. I believe it's important for the teachers to share their experiences on social media so that people can better understand the Montessori Method. I believe the largest obstacle faced by this type of school will be the lack of understanding by the community of exactly what they do and why they should be utilized as opposed to our "normal" system of education. I also believe it's important that the school be a pillar of support for the community by creating volunteering events and fundraising events.

5. How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interests of the school?

I would first discuss it with the member/members partaking in this situation to see why they were doing it and to see if I could change their minds and actions by re-explaining to them the purpose and mission of the school. If they were doing it for their own gain I would attempt to discuss it with those higher up in the organization.

Charter School Board Member Information Form

(To be completed individually by each proposed charter school board member. All forms must be signed by hand.)

Serving on a public charter school board is a position of public trust and fiduciary responsibility. As a board member of a public school, you are responsible for ensuring the quality of the school program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, BSU requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the applicant team behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

Background

1. Name of charter school on whose Board of Directors you intend to serve:
2. Full name: *See Attachment*
Home Address:
Business Name and Address:

Telephone No.:
E-mail address:
3. Brief educational and employment history. (No narrative response is required if resume and professional biography are attached to the application)
☒ Resume and professional biography are provided.
4. Indicate whether you currently or have previously served on a board of a school district, another charter school, a non-public school or any not-for-profit corporation.
☒ Does not apply to me. ☐ Yes
5. Why do you wish to serve on the board of the proposed charter school?
See Attachment
6. What is your understanding of the appropriate role of a public charter school board member?
See Attachment
7. Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.
See Attachment
8. Describe the specific knowledge and experience that you would bring to the board.
See Attachment

School Mission and Program

1. What is your understanding of the school's mission and guiding beliefs?
"see Attachment"
2. What is your understanding of the school's proposed educational program?
()
3. What do you believe to be the characteristics of a successful school?
()
4. How will you know that the school is succeeding (or not) in its mission?
()

Governance

1. Describe the role that the board will play in the school's operation.
2. How will you know if the school is successful at the end of the first year of operation?
3. How will you know at the end of four years if the school is successful?
4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?
5. How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interests of the school?

Disclosures

1. Indicate whether you or your spouse knows the other prospective board members for the proposed school. If so, please indicate the precise nature of your relationship.
☐ I / we do not know any such trustees. ☒ Yes
2. Indicate whether you or your spouse knows any person who is, or has been in the last two years, a school employee. If so, indicate the precise nature of your relationship.
We are friends with Joy.
☐ I / we do not know any such employees. ☒ Yes
3. Indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the charter school (whether as an individual or as a director, officer, employee or agent of some entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the school.
She is friends with Joy.
☒ I / we do not know any such persons. ☐ Yes
4. Indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the school. If so, indicate the precise nature of the business that is being or will be conducted.
☒ I / we do not anticipate conducting any such business. ☐ Yes

5. If the school intends to contract with an education service provider or management organization, indicate whether you or your spouse knows any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship.
☐ Not applicable because the school does not intend to contract with an education service provider or school management organization.
☒ I / we do not know any such persons. ☐ Yes
6. If the school intends to contract with an education service provider, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, contractual or management interest in the provider. For any interest indicated, provide a detailed description.
☐ N/A ☒ I / we have no such interest. ☐ Yes
7. If the school plans to contract with an education service provider, indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, indicate the precise nature of the business that is being or will be conducted.
☐ N/A ☒ I / we or my family do not anticipate conducting any such business. ☐ Yes
8. Indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.
☒ Does not apply to me, my spouse or family. ☐ Yes
9. Indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you serve on the school's board. ☒ None ☐ Yes

Certification

I, Jonathan Kroenke, certify to the best of my knowledge and ability that the information I am providing to the Ball State University Office of Charter Schools as a prospective board member for Maria Montessori Charter School is true and correct in every respect.

 1/22/2019
Signature Date

Charter School Board Member Information Form

(To be completed individually by each proposed charter school board member. All forms must be signed by hand.)

Serving on a public charter school board is a position of public trust and fiduciary responsibility. As a board member of a public school, you are responsible for ensuring the quality of the school program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, BSU requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the applicant team behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

Background

1. Name of charter school on whose Board of Directors you intend to serve:
2. Full name: Joy Prudence Rees
Home Address: 1615 N Centennial Street, Indianapolis, Indiana 46222
Business Name and Address: Maria Montessori International Academy

Telephone No.: (765)603-3995
E-mail address: joy.rees@inmontessori.com
3. Brief educational and employment history. (No narrative response is required if resume and professional biography are attached to the application)
Resume and professional biography are provided.
4. Indicate whether you currently or have previously served on a board of a school district, another charter school, a non-public school or any not-for-profit corporation.
I have not.
5. Why do you wish to serve on the board of the proposed charter school?
I would like to serve on this board because I firmly believe in the benefits of Montessori. It is my dream and goal to be able to make a Montessori Education available to all students especially students from diverse backgrounds and/or low income families.
6. What is your understanding of the appropriate role of a public charter school board member?
As a board member it is my job to help provides checks and balances to this school. I am here to make sure that the states investment in this charter school is not made in vain. The goal is to provide an elite education and give every student an equal opportunity at receiving this high quality education.
7. Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.

I have not served on other boards but with my past business and education experience and through the mentorship of two individuals that have served on boards, one of them serving on the board of a charter school. I believe I will be able to advise Montessori Academy Preparatory School and contribute to the success of this Charter.

8. Describe the specific knowledge and experience that you would bring to the board.

I have worked with children for over eight years all together, about a fourth of the time I spent working in a Montessori. I also have ran multiple dental offices as an office manager. My past experience will allow me to honor the education and not for profit side of this Charter but I will be able to look at our financials as if we are a for profit business when necessary.

School Mission and Program

1. What is your understanding of the school's mission and guiding beliefs?

- a. The Mission of Montessori Academy Preparatory School is to provide students in the Indianapolis and Zionsville Area with a Montessori Education supported by six core values.
- i. International Mindedness: MAPS believes in diverse students and diverse teachers through learning about others that are different then us we are better able to coexist and live inclusively with those around us.
 - ii. Empowered Classrooms: Child-centered Montessori Classrooms allow both the educator and the student to be empowered in the classroom. Treating children with respect results in adults that treat everyone with respect.
 - iii. Passionate Service: It takes a village to raise a child. MAPS is committed to educating the families of our students as well as the student. Learning does not stop when the child leaves the classroom. We strive to provide a passionate service that educates the entire family.
 - iv. Joyful Learning: We want your children to fall in love with learning and develop into life long learners. MAPS values the education of it students and its teachers so professional development will be provided on a regular basis.
 - v. STEAM Focused: Science, Technology, Engineering, Art, and Math. These areas of concentrations are our focus from the classroom to the gym.
 - vi. Elite Quality: Everything is done with the highest of quality!

2. What is your understanding of the school's proposed educational program?

- a. Montessori Academy Preparatory School or MAPS is a proposed Montessori Charter School serving kindergarten through fifth grade in the Indianapolis and Zionsville/ Carmel Area.

3. What do you believe to be the characteristics of a successful school?

- a. A successful school begins with nurturing, continuously educated teachers, supports diversity, offers the same type of elite education to all students, fosters early literacy, and strives for the highest quality.

4. How will you know that the school is succeeding (or not) in its mission?

- a. I will know that the school is successful if the majority of students are performing one year above common core.

Governance

1. Describe the role that the board will play in the school's operation.

- a. As a board member I will contribute my knowledge in education and business when major decision need to be made that will impact the entire Charter.

2. How will you know if the school is successful at the end of the first year of operation?
 - a. Our first year will be successful if we are able to serve 100 students with advanced education.
3. How will you know at the end of four years if the school is successful?
 - a. Our fourth year will look successful if we are progressively able to serve more children annually and we are looking to expand to eighth grade.
4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?
 - a. Advice on Budgeting
 - b. Advice on Legal Issue
 - c. Advice based on State Standards
 - d. Advice on Major Staffing Decisions
5. How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interests of the school?
 - a. I would first try to speak to the board member one on one and as for clarification on the situation and explain my point of view is allowed. If we are unable to resolve the issue, I would privately bring this to the attention of the President to try and resolve the issue.

Disclosures

1. Indicate whether you or your spouse knows the other prospective board members for the proposed school. If so, please indicate the precise nature of your relationship.
I / we do not know any such trustees. **Yes, friendship.**
2. Indicate whether you or your spouse knows any person who is, or has been in the last two years, a school employee. If so, indicate the precise nature of your relationship.
I / we do not know any such employees. Yes
3. Indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the charter school (whether as an individual or as a director, officer, employee or agent of some entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the school.
I / we do not know any such persons. Yes.
4. Indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the school. If so, indicate the precise nature of the business that is being or will be conducted.
I / we do not anticipate conducting any such business. Yes

5. If the school intends to contract with an education service provider or management organization, indicate whether you or your spouse knows any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship.
Not applicable because the school does not intend to contract with an education service provider or school management organization.
I / we do not know any such persons. Yes
6. If the school intends to contract with an education service provider, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, contractual or management interest in the provider. For any interest indicated, provide a detailed description.
N/A **I / we have no such interest.** Yes
7. If the school plans to contract with an education service provider, indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, indicate the precise nature of the business that is being or will be conducted.
N/A **I / we or my family do not anticipate conducting any such business.** Yes
8. Indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.
Does not apply to me, my spouse or family. Yes
9. Indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you serve on the school's board. **None** Yes

Certification

I, Joy P Rees, certify to the best of my knowledge and ability that the information I am providing to the Ball State University Office of Charter Schools as a prospective board member for Montessori Academy Preparatory School Charter School is true and correct in every respect.

Joy Prudence Rees (electronic signature)

Signature

01-30-2019

Date

The Montessori Educational Charity

Board Chair Responsibilities

A. General Responsibilities

In addition to his or her responsibilities as a member of the Board of Directors, the Chair is also responsible for ensuring that the Board of Directors and its members are aware of and fulfill their governance responsibilities and are held accountable for their performance. The Chair fulfills this responsibility by presiding over meetings, proposing policies and practices, sitting on various committees, monitoring director and officer performance, submitting various reports to the Board and other stakeholders, proposing the creation of committees, appointing members to such committees, and performing other duties as the need arises and/or as defined in the bylaws.

B. Term

The Chair is elected at the Board of Directors' Annual Meeting to hold office for a two-year term (or until a successor is elected and qualified), and is eligible for re-election for one additional consecutive two-year term.

C. Accountability

The Chair is accountable to the Board of Directors as specified in the bylaws.

D. Specific Duties

1. Meetings

The Chair presides over board meetings. In this capacity, the Chair:

- Establishes a schedule of board meetings;
- Ensures that an agenda is planned for each board meeting;
- Chairs board meetings according to accepted rules of order;
- Ensuring all decisions are reached in an orderly, timely, and democratic manner; and
- Votes as prescribed in the bylaws.

2. Board Committees

The Chair serves as an *ex-officio* member of board committees specified in the bylaws by:

- Serving as a voting member of the committee (if specified in the bylaws);
- Negotiating reporting schedules; and
- Identifying problems, assisting the committee chairperson to resolve these problems, bringing them to the attention of the Board of Directors.

3. Board-Staff Relations

The Chair is the primary liaison between the Board of Directors and the President/CEO. In this capacity, the Chair:

- Meets periodically with the President/CEO;
- Ensures that periodic performance reviews of the President/CEO are conducted; and
- Participates in the hiring and evaluation of the President/CEO.

4. Community Relations

The Chair ensures that the organization maintains positive and productive relationships with media, funders, donors, and other organizations. In this capacity, the Chair serves as primary spokesperson for the organization.

5. Signing Officer

The Chair is designated by the Board of Directors and/or bylaws as one of the signing officers for certain documents. In this capacity, the Chair may be authorized or required to sign or countersign checks, correspondence, applications, reports, contracts, or other documents on behalf of organization.

6. Board Development

The Chair ensures that structures and procedures are in place for effective recruitment, training, and evaluation of board members.

7. Fundraising

The Chair ensures that structures and procedures are in place for securing the resources required by the organization. This may require the Chair to play a leadership role in fundraising campaigns through personal contributions of services and money.

8. Delegation

The Chair may establish or propose the establishment of board committees. The Chair may also delegate responsibilities to these committees as appropriate – though final accountability remains with the Chair.

E. Qualifications

The Chair must display a commitment to The Montessori Educational Charity and its principles, mission, goals, and services. The Chair must also be able to articulate concepts and ideas as well as serve as a skilled facilitator.

The Montessori Educational Charity Board Committee Chair Responsibilities

A. General Responsibilities

In addition to his or her responsibilities as a member of the Board of Directors, a Board Committee Chair also responsible for achieving the specific objectives of the committee of which he or she oversees. Committees are established either through bylaw provision or by approval of the Board Chair.

B. Term

Committee Chairs are nominated/elected at the Board of Directors' Annual Meeting to hold office for a two-year term, (or until a successor is elected and qualified).

C. Accountability

Committee Chairs are accountable to the Board Chair as specified in the bylaws.

D. Specific Duties

Committee Chairs must:

- Set tone for the committee work;
- Ensure that members have the information needed to do their jobs;
- Oversee the logistics of committee's operations;
- Report to the President;
- Report to the full Board on the committee's decisions/recommendations;
- Work closely with the President/CEO and other staff;
- Set committee meeting agenda, and takes meeting minutes, and distributes meeting minutes to committee members;
- Assign work to the committee members; and
- Initiates and leads the committee's annual evaluation.

The Montessori Educational Charity Board Committee Chair Responsibilities

A. General Responsibilities

In addition to his or her responsibilities as a member of the Board of Directors, a Board Committee Chair is also responsible for achieving the specific objectives of the committee of which he or she oversees. Committees are established either through bylaw provision or by approval of the Board Chair.

B. Term

Committee Chairs are nominated/elected at the Board of Directors' Annual Meeting to hold office for a two-year term (or until a successor is elected and qualified).

C. Accountability

Committee Chairs are accountable to the Board Chair as specified in the bylaws.

D. Specific Duties

Committee Chairs must:

- Set tone for the committee work;
- Ensure that members have the information needed to do their jobs;
- Oversee the logistics of committee's operations;
- Report to the President;
- Report to the full Board on the committee's decisions/recommendations;
- Work closely with the President/CEO and other staff;
- Set committee meeting agenda, and takes meeting minutes, and distributes meeting minutes to committee members;
- Assign work to the committee members; and
- Initiates and leads the committee's annual evaluation.

The Montessori Educational Charity

Board Member Responsibilities

A. General Responsibilities

Members of the Board of Directors develop policies, procedures, and regulations for the operation of The Montessori Educational Charity. Members also monitor the MEC's financial health, programs, and overall performance.

B. Term

Members are elected at the Board of Directors' Annual Meeting to hold office for a two-year term (or until a successor is elected and qualified). Members can serve an unlimited number of terms.

C. Accountability

Members are accountable to the Chair as specified in the bylaws.

D. Specific Duties

1. Meetings

Board Members must attend at least 90% of scheduled meetings.

2. Board Committees

Members must serve on at least one of the committees specified in the bylaws or established by the Chair.

3. Board Development

Members must participate in Board Development activities as required.

4. Planning

Members must work in conjunction with one another and the President/CEO to:

- Approve the school's philosophy and review management's performance in achieving it.
- Annually assess the environment and approve the school's strategy in relation to it.
- Annually review and approve the MEC's plans for funding its strategy.

- Review and approve the MEC's five-year financial goals.
- Annually review and approve the MEC's budget.
- Approve major policies.

5. Governance

Members must work in conjunction with one another and the President/CEO to:

- Elect, monitor, appraise, advise, support, reward, and when necessary, change top management.
- Ensure that management succession is properly being provided.
- Ensure that the status of organizational strength and manpower planning is equal to the requirements of the long-range goals.
- Approve appropriate compensation and benefit policies/practices.
- Annually approve the Performance Review of the President/CEO and establish his/her compensation based on recommendations of the Personnel Committee and Chairman of the Board.
- Determine eligibility for and appoint new Members in response to recommendations of the Nominating Committee.
- Annually review the performance of the Board and take steps to improve its performance.

6. Operations

Members must work in conjunction with one another and the President/CEO to:

- Review the results achieved by management as compared with the school's philosophy, annual, and long-range goals.
- Be certain that the school's financial structure is adequate for its current needs and its long-range strategy.
- Provide candid and constructive criticism, advice, and comments.
- Approve major actions such as capital expenditures and major program and service changes.

7. Audit

Members must work in conjunction with one another and the President/CEO to:

- Ensure that Board of Directors and its committees are adequately and currently informed - through reports and other methods - of the school's condition and its operations.
- Ensure that published reports properly reflect the MEC's operating results and financial condition.
- Ascertain that management has established appropriate policies to define and identify conflicts of interest.
- Appoint independent auditors subject to approval by members.
- Review compliance with relevant material laws affecting the MEC.

8. Fundraising

Members must participate in the MEC's fundraising activities in whatever capacity possible. Participation can include personal financial contributions, soliciting contributions, participating in the planning of fundraising events, and other related tasks.

E. Qualifications

Members must display a commitment to The MEC and its principles, mission, goals, and services.

The Montessori Educational Charity

Board Secretary Responsibilities

A. General Responsibilities

In addition to his or her responsibilities as a member of the Board of Directors, the Secretary is also responsible for ensuring that accurate and sufficient documentation exists to meet legal requirements and to enable authorized persons to determine when, how, and by whom the Board's business was conducted. In order to fulfill these responsibilities, the Secretary records minutes of meetings, ensures minutes' accuracy and availability, proposes policies and practices, submits various reports to the Board of Directors, maintains membership records, and performs other duties as the need arises and/or as defined in the bylaws.

B. Term

The Secretary is elected at the Board of Directors' Annual Meeting to hold office for a two-year term, (or until a successor is elected and qualified), and is eligible for re-election for one additional consecutive two-year term.

C. Accountability

The Secretary is accountable to the Board Chair.

D. Specific Duties

1. Meetings

The Secretary participates in Board meetings as a voting member and provides items for the agenda as appropriate. In the absence of the Chair or Vice-Chair, the Secretary calls the meeting to order and presides until a temporary chairperson is elected. The Secretary records meeting minutes as described below.

2. Minutes

The Secretary is responsible for ensuring that accurate minutes of meetings are taken and approved. Minutes should at least include:

- Meeting date, time, and location;
- A list of those present and absent;

- A list of items discussed;
- A list of reports presented; and
- The text of motions presented and a description of their disposition.

The Secretary signs a copy of the final approved minutes and ensures that this copy is maintained in the corporate records.

3. Custodian of Records

The Secretary ensures that organization records are maintained as required by law and made available when required by authorized persons. These records may include founding documents, lists of directors, board and committee meeting minutes, financial reports, and other official records.

The Secretary also ensures that an up-to-date copy of the bylaws is available at all meetings.

4. Communication

The Secretary manages the general correspondence of the Board of Directors except for such correspondence assigned to others.

5. Signing Officer

The Secretary is designated by the Board of Directors and/or bylaws as one of the signing officers for certain documents. In this capacity, the Secretary may be authorized or required to sign or countersign checks, correspondence, applications, reports, contracts, or other documents on behalf of organization.

6. Filing of Documents

The Secretary will be the registered agent with respect to the laws of the State of Indiana. Thus, the Secretary will be the person upon whom legal notice to the corporation is served and is subsequently responsible for ensuring that documents necessary to maintain the corporation are filed.

E. Qualifications

The Secretary must display a commitment to The Montessori Educational Charity and its principles, mission, goals, and services.

The Montessori Educational Charity

Board Treasurer Responsibilities

A. General Responsibilities

In addition to his or her responsibilities as a member of the Board of Directors, the Treasurer ensures that current records are maintained which reflects the financial condition of The Montessori Educational Charity. These records will include cash, outstanding advances, investments, accounts receivable and other assets, accounts payable, and fund balances.

B. Term

The Treasurer is elected at the Board of Directors' Annual Meeting to hold office for a two-year term, (or until a successor is elected and qualified), and is eligible for re-election for one additional consecutive two-year term.

C. Accountability

The Treasurer is accountable to the Board Chair.

D. Specific Duties

1. Meetings

The Treasurer participates in Board meetings as a voting member and provides items for the agenda as appropriate.

2. Finance and Compliance

The Treasurer must:

- Serve as Chair of the Finance Committee;
- Manage, with the Finance Committee, the Board's review of, and action related to, the Board's financial responsibilities;
- Work with the President/CEO and Director of Finance/Operations to ensure that appropriate financial reports are made available to the Board on a timely basis;
- Assist the President/CEO and Director of Finance/Operations in preparing the annual budget, and presenting the budget to the Board for approval;

- Work with the Finance Committee, President/CEO, and Director of Finance/Operations to develop fiscal policies for recommendation to the Board to ensure the financial integrity and sustainability of the organization.
- Work with the Finance Committee, the President/CEO, and Director of Finance/Operations to develop long-term financial strategies.
- Keep currently informed of legal, regulatory, and sector developments relating to the Board's financial responsibilities.

3. Signing Officer

The Treasurer is designated by the Board of Directors and/or bylaws as one of the signing officers for certain documents. In this capacity, the Treasurer may be authorized or required to sign or countersign checks, correspondence, applications, reports, contracts, or other documents on behalf of organization.

E. Qualifications

The Treasurer must display a commitment to The Montessori Educational Charity and its principles, mission, goals, and services. The treasurer must also display the following:

- An understanding of record keeping, accounting systems, and financial reports;
- An understanding of human resources; and
- An ability to work with the President/CEO, staff members, auditors, and other individuals, as required.

The Montessori Educational Charity

Board Vice-Chair Responsibilities

A. General Responsibilities

In addition to his or her responsibilities as a member of the Board of Directors, the Vice-Chair will assist the Chair in ensuring that the Board of Directors and its members are aware of and fulfill their governance responsibilities and are held accountable for their performance. The Vice-Chair fulfills this responsibility by presiding over meetings in the Chair's absence, proposing policies and practices, sitting on various committees, submitting various reports to the Board and other stakeholders, proposing the creation of committees, and performing other duties as the need arises and/or as defined in the bylaws.

B. Term

The Vice-Chair is elected at the Board of Directors' Annual Meeting to hold office for a two-year term (or until a successor is elected and qualified), and is eligible for re-election for one additional consecutive two-year term.

C. Accountability

The Vice-Chair is accountable to the Board of Directors as specified in the bylaws.

D. Specific Duties

1. Meetings

The Vice-Chair presides over board meetings in the Chair's absence.

2. Signing Officer

The Vice-Chair is designated by the Board of Directors and/or bylaws as one of the signing officers for certain documents. In this capacity, the Vice-Chair may be authorized or required to sign or countersign checks, correspondence, applications, reports, contracts, or other documents on behalf of organization.

E. Qualifications

The Vice-Chair must display a commitment to The Montessori Educational Charity and its principles, mission, goals, and services. The Vice-Chair must also be able to articulate concepts and ideas as well as serve as a skilled facilitator.

The Montessori Educational Charity

President/CEO Responsibilities

Job Title: President/CEO

Reports to: Chair of the Board

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

Summary: The President/CEO is the chief operating officer appointed by the Board to administer the implementation of the organization's mission and operating policy. He/she is an educational director who provides leadership to staff providing day-to-day educational leadership for the schools operated by the MEC.

The President/CEO carries out the MEC's broad educational mission and policies as established by the Board. The President/CEO is also a member of the Board and has a vote in all matters except those in which there is a conflict (e.g. evaluation, compensation, etc.).

Relationship with the Board

- Brings to the attention of the Chair of the Board such matters and data about the needs and operation of the MEC and its schools as are appropriate to keep the Board fully informed to meet its responsibilities.
- Serves as the chief communicator between the Board and the faculty.

Organization

- Creates an appropriate and strong management team for the MEC and its schools.
- Promotes an internal organization that permits effective communication - up and down.
- Works to produce smooth day-to-day internal operations.

Planning and Analysis

- Develops with the faculty and staff tactical plans for the MEC and its schools. Also participates with the Board in strategic planning.
- Encourages perspective via testing, comparisons with similar institutions, and external analyses and critiques.

- Remains abreast of trends and research in education, particularly those affecting independent school operation and educational leadership.

Programs

- Designs, implements and administers student programs and services, appropriate to the needs of those enrolled and consistent with the values and teaching styles of a progressive humanistic Montessori approach, and develops systems of scheduling to accommodate these programs and services.
- Sets standards of participation and achievement in each of the following areas
Assures that the curricular scope and sequence, as well as instructional strategies, reflect the the MEC and its schools' progressive, humanistic Montessori philosophy and goals.
- Provides leadership in the process of curriculum development.
- Provides assistance and support to the staff in their efforts to develop curricula that reflect the MEC and its schools' progressive, humanistic Montessori philosophy and goals.
- Organizes activities, elective offerings of a para-academic nature, formal cultural exposures, and athletics sufficient to round out the MEC and its schools' academic program and provide for student interest development.
- Implements formal and informal programs that relate to high moral and ethical conduct. This includes counseling and advisory programs, a system of positive discipline that promotes kindness and courtesy, and a mechanism for coordinated psychological assistance in the event of student need.
- Establishes and oversees programs for after hours and weekends, including extended day programs and recreational and cultural activities.

Personnel

- Defines the teaching and non-teaching professional faculty positions needed.
- Recruits highly effective teachers and staff to fill them.
- Establishes productive working conditions, discipline, training and development of all professional staff.
- Assures that the professional staff understand and share the MEC's progressive, humanistic Montessori philosophy and goals.
- Determines standards and takes appropriate steps to measure and maintain reasonable performance and professional growth among immediate direct reports and, through them, all professional employees; dismisses those who fail to meet the standards.

- Establishes practices and procedures to promote harmonious and constructive relationships among all of the MEC's professional staff. Consciously works to establish an atmosphere of team building and planning. Follows a collegial managerial style rather than authoritarian.
- Maintains personal contact with all MEC staff members, fostering good public relations, promoting high morale, and identifying personnel problems as early as possible. Encourages similar conduct among direct reports.

Program and Service Support

- Works with the staff to identify curriculum needs in terms of teaching materials, faculty, and program support.
- Holds general program responsibility for the safety and well-being of all students attending MEC schools.
- Approves and administers rules and procedures governing the student body attending all MEC schools.
- Works to promote harmonious relationships between students, faculty and administrators, recognizing the importance of developing each individual.
- Oversees the evaluation of student progress and systems for communicating with parents. Works with the faculty to develop and implement procedures for tracking student status and progress and for intervening early when concerns are identified.
- Meets with the faculty regularly to discuss student progress, and assures and facilitates contact and follow-up with families as needed.
- Strives to create and maintain an aesthetically attractive environment for all schools operated by the MEC.

Finance

- Works with the Director of Finance/Operations to complete annual budget proposal for submission to the Board with the assistance of the Board's Finance Committee.
- Once the year's budget is approved by the Board, ensures that the available financial resources are carefully managed within the budgetary guidelines.
- While the task may be delegated to direct reports, is ultimately responsible for ensuring that all student accounts are up-to-date.

School Enrollment

- Recommends enrollment objectives with respect to student numbers, character, and qualities to predict success at schools operated by the MEC - and executes programs to achieve them.
- Works with the Board and faculty to establish and administer standards and procedures for admission and dismissals.

Constituent Relations

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

Institutional Image

- Interprets the MEC and its programs to the public and strives to personify the MEC.
- Serves as a primary spokesperson for the MEC.

Fund Raising

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

Qualifications

- Extensive experience with Montessori education, teaching and school administration.
- Masters degree.

Attachment 25

Board Code of Ethics; Conflict of Interest Policy

Pursuant to the start-up plan contained in Attachment 22, The MEC Board of Directors will develop a code of ethics and conflict of interest policy by April 2019. It is currently working with several key stakeholders and community members to do so.

Attachment 17:

Staffing Chart

MAPS will have 100% staffing beginning Year 1.

- 1 Principal serving two campuses.
- 1 Director of Finance/Operations serving two campuses.
- 1 Administrative Assistant serving two campuses.
- 8 Classroom Teachers for 8 classrooms – 4 on each campus.
- 8 Classroom Assistants for 8 classrooms – 4 on each campus.
- Security Firm for two campuses.
- IT Contractor serving two campuses.

Attachment 20

Facility Documents

Notice of Intent to Offer a Lease

TO WHOM IT MAY CONCERN:

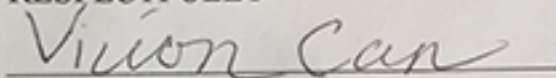
My Name is Vivian Cain, and I am the Board Chair and President/CEO of The Montessori Educational Charity. I am writing this document to affirm my intent to lease two buildings that I own to The Montessori Educational Charity so that it can operate MAPS Charter school upon approval of a charter by Ball State University. The two Campuses are:

- Campus 1: 7507 Michigan Road, Indianapolis IN, 46268.
- Campus 2: 4370 Weston Pointe Drive, Zionsville/ Carmel IN 46077.

The lease will be executed upon approval of the charter. The lease will include occupancy, utilities, CAM, and renovations needed to operate the school. The amount of the lease for each site is as follows:

- Campus 1: 7507 Michigan Road, Indianapolis IN, 46268. \$192,000 per year.
- Campus 2: 4370 Weston Pointe Drive, Zionsville/ Carmel IN 46077. \$252,000 per year.

RESPECTFULLY



Vivian Cain

Campus 1: 7507 Michigan Road, Indianapolis IN, 46268.



Campus 2: 4370 Weston Pointe Drive, Zionsville/ Carmel IN 46077



Attachment 22

Work Plan

The Montessori Educational Charity will engage in capacity building and predevelopment work which will position it to open MAPS by Fall 2020. This work will be facilitated under the leadership of Board Chair Vivian Cain and a team of consultants in education, board development strategic planning, finance, and law. This team will work together to create plans, conduct capacity building work, and pursue the steps needed to achieve the following milestones:

Milestones	Timeline for
Continue board development process with consultants (ongoing).	03/19
Complete Board background checks.	06/19
Secure legal/accounting services.	07/19
Begin financial planning for school.	07/19
Finalize/sign lease.	07/19
Develop board policies.	08/19
Refine admissions policy.	09/19
Refine budget into final operating budgets.	09/19
Begin/continue community engagement re: promotion of school and opening.	10/19
Implement leader/staff 360 evaluation process.	11/19
Complete curriculum mapping process/plan.	11/19
Develop discipline policy.	01/20
Begin student recruitment.	01/20
Refine learning standards, exist standards, and school calendar.	01/20
Begin teacher recruitment.	02/20
Develop safety plan.	03/20
Develop grievance policy.	03/20

Milestones		Timeline for
Negotiate food service contracts.		04/20
Conduct admissions lottery.		04/20
Develop personnel policy/employment manual.		04/20
Obtain required insurance coverage.		05/20
Hire security firm.		05/20
Secure IT contractor.		05/20
Implement funding plan.		06/20
Hire Principal.		06/20
Hire Director of Finance/Operations.		06/20
Hire other school staff.		06/20
Complete background checks of all new hires.		07/20
Ensure leasehold improvements are made.		07/20
Conduct teacher induction two-week session: 8/3/20 – 8/14/20.		08/20
Open School: 216 students.		08/20

Attachment 23

Insurance

The MEC will obtain the following types of insurance to operate MAPS:

Board Errors and Omissions, General Liability Insurance. Property & Casualty Insurance Theft Insurance, umbrella/excess liability, and criminal.

It will obtain these policies from the following agent:

John D. Null, CPCU

President

HJ Spier Co., Inc.

8250 Woodfield Crossing Blvd., #330 |

Indianapolis, IN 46240

Direct: [317-815-2810](tel:317-815-2810) | Main: [317-815-2800](tel:317-815-2800)

Email: jdnnull@hjspier.com | www.hjspier.com

Attachment 24:

Budget Worksheets

Budget Schedule B																	
Projected Enrollment:	216	School Name:	Montessori Academy Preparatory School					Dates Covered:		2020-2021						Minimum Revenue for Financial Viability:	
	Description (where requested in Column A)	July	August	September	October	November	December	January	February	March	April	May	June	Total			
I. CASH IN (INCOME):																	
Donations/Gifts (Please Describe)	\$20,000	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$20,000.00			
Food Service	\$155,520			\$17,280.00	\$17,280.00	\$17,280.00	\$17,280.00	\$17,280.00	\$17,280.00	\$17,280.00	\$17,280.00	\$17,280.00	\$17,280.00	\$155,520.00			
Investment Earnings	\$0													\$0.00			
Loan From Common School Loan	\$35,000	\$2,916.67	\$2,916.67	\$2,916.67	\$2,916.67	\$2,916.67	\$2,916.67	\$2,916.67	\$2,916.67	\$2,916.67	\$2,916.67	\$2,916.67	\$2,916.67	\$35,000.00			
Other Grants: See Appendix	\$400,000	\$33,333.33	\$33,333.33	\$33,333.33	\$33,333.33	\$33,333.33	\$33,333.33	\$33,333.33	\$33,333.33	\$33,333.33	\$33,333.33	\$33,333.33	\$33,333.33	\$400,000.00			
State Grants (Please Describe)	\$0													\$0.00			
State Tuition Support	\$1,316,304	\$39,692.00	\$109,692.00	\$109,692.00	\$109,692.00	\$109,692.00	\$109,692.00	\$109,692.00	\$109,692.00	\$109,692.00	\$109,692.00	\$109,692.00	\$109,692.00	\$1,316,304.00			
E-Rate	\$20,000	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$20,000.00			
Transportation	\$0													\$0.00			
Student Fees: \$200 per student	\$43,200	\$3,600.00	\$3,600.00	\$3,600.00	\$3,600.00	\$3,600.00	\$3,600.00	\$3,600.00	\$3,600.00	\$3,600.00	\$3,600.00	\$3,600.00	\$3,600.00	\$43,200.00			
TOTAL CASH IN (INCOME):	\$1,990,024.00	\$82,875.33	\$152,875.33	\$170,155.33	\$170,155.33	\$170,155.33	\$170,155.33	\$170,155.33	\$170,155.33	\$170,155.33	\$170,155.33	\$170,155.33	\$170,155.33	\$222,875.33	\$1,990,024.00		
II. EXPENDITURES:																	
A. Employee Salaries																	
Director/Principal	\$70,000		\$5,833.33	\$5,833.33	\$5,833.33	\$5,833.33	\$5,833.33	\$5,833.33	\$5,833.33	\$5,833.33	\$5,833.33	\$5,833.33	\$5,833.33	\$70,000.00			
Director of Finance/Operations	\$50,000	\$4,166.67	\$4,166.67	\$4,166.67	\$4,166.67	\$4,166.67	\$4,166.67	\$4,166.67	\$4,166.67	\$4,166.67	\$4,166.67	\$4,166.67	\$4,166.67	\$50,000.00			
Classroom Assistants																	
8 classroom assistants; salary of \$30,000 each.	\$240,000		\$20,000.00	\$20,000.00	\$20,000.00	\$20,000.00	\$20,000.00	\$20,000.00	\$20,000.00	\$20,000.00	\$20,000.00	\$20,000.00	\$20,000.00	\$240,000.00			
Admin Assistant	\$30,000	\$2,500.00	\$2,500.00	\$2,500.00	\$2,500.00	\$2,500.00	\$2,500.00	\$2,500.00	\$2,500.00	\$2,500.00	\$2,500.00	\$2,500.00	\$2,500.00	\$30,000.00			
Teachers:																	
8 teachers; salary at \$45,000 each.	\$360,000	\$0.00	\$30,000.00	\$30,000.00	\$30,000.00	\$30,000.00	\$30,000.00	\$30,000.00	\$30,000.00	\$30,000.00	\$30,000.00	\$30,000.00	\$30,000.00	\$360,000.00			
Total Employee Salaries	\$750,000.00	\$6,666.67	\$62,500.00	\$62,500.00	\$62,500.00	\$62,500.00	\$62,500.00	\$62,500.00	\$62,500.00	\$62,500.00	\$62,500.00	\$62,500.00	\$62,500.00	\$118,333.33	\$750,000.00		
B. Employee Benefits																	
25% of salaries to be used for FICA, health insurance, unemployment, retirement, worker's comp, life insurance.	\$187,500	\$1,667	\$15,625	\$15,625	\$15,625	\$15,625	\$15,625	\$15,625	\$15,625	\$15,625	\$15,625	\$15,625	\$15,625	\$187,500.00			
Total Employee Benefits	\$187,500.00	\$1,666.67	\$15,625.00	\$15,625.00	\$15,625.00	\$15,625.00	\$15,625.00	\$15,625.00	\$15,625.00	\$15,625.00	\$15,625.00	\$15,625.00	\$15,625.00	\$29,583.33	\$187,500.00		
C. Rental of Facilities & Utilities																	
Lease: Zionville/Carmel																	
\$21,000 per month. Include costs for occupancy, CAM, renovations.	\$252,000	\$21,000.00	\$21,000.00	\$21,000.00	\$21,000.00	\$21,000.00	\$21,000.00	\$21,000.00	\$21,000.00	\$21,000.00	\$21,000.00	\$21,000.00	\$21,000.00	\$252,000.00			
Lease: Indianapolis																	
\$16,000 per month. Include costs for occupancy, CAM, renovations.	\$192,000	\$16,000.00	\$16,000.00	\$16,000.00	\$16,000.00	\$16,000.00	\$16,000.00	\$16,000.00	\$16,000.00	\$16,000.00	\$16,000.00	\$16,000.00	\$16,000.00	\$192,000.00			
Internet Access	\$8,000.00	\$666.67	\$666.67	\$666.67	\$666.67	\$666.67	\$666.67	\$666.67	\$666.67	\$666.67	\$666.67	\$666.67	\$666.67	\$8,000.00			
Repair & Maintenance Services	\$60,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$60,000.00			
Phone	\$4,800.00	\$400.00	\$400.00	\$400.00	\$400.00	\$400.00	\$400.00	\$400.00	\$400.00	\$400.00	\$400.00	\$400.00	\$400.00	\$4,800.00			
Total Rent and Utilities	\$516,800.00	\$43,066.67	\$43,066.67	\$43,066.67	\$43,066.67	\$43,066.67	\$43,066.67	\$43,066.67	\$43,066.67	\$43,066.67	\$43,066.67	\$43,066.67	\$43,066.67	\$516,800.00			
D. Insurance:																	
Board Errors and Omissions, General Liability Insurance, Property & Casualty Insurance	\$12,000.00	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00	\$12,000.00			
Theft Insurance, Umbrella/excess Liability, Criminal																	
Total Insurance	\$12,000.00	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00	\$12,000.00			
E. Service Contracts																	
Accounting & Payroll Services	\$6,000.00	\$500.00	\$500.00	\$500.00	\$500.00	\$500.00	\$500.00	\$500.00	\$500.00	\$500.00	\$500.00	\$500.00	\$500.00	\$6,000.00			
Consulting Services	\$20,000.00	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$20,000.00			
Equipment Rental & Lease	\$10,000.00	\$833.33	\$833.33	\$833.33	\$833.33	\$833.33	\$833.33	\$833.33	\$833.33	\$833.33	\$833.33	\$833.33	\$833.33	\$10,000.00			
Food Service Contract	\$155,520.00	\$0.00	\$0.00	\$17,280.00	\$17,280.00	\$17,280.00	\$17,280.00	\$17,280.00	\$17,280.00	\$17,280.00	\$17,280.00	\$17,280.00	\$17,280.00	\$155,520.00			
Legal Services	\$4,000.00	\$333.33	\$333.33	\$333.33	\$333.33	\$333.33	\$333.33	\$333.33	\$333.33	\$333.33	\$333.33	\$333.33	\$333.33	\$4,000.00			
Professional & Technical Services	\$20,000.00	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$20,000.00			
Pupil Transportation Contract	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			
Security Services	\$30,000.00	\$2,500.00	\$2,500.00	\$2,500.00	\$2,500.00	\$2,500.00	\$2,500.00	\$2,500.00	\$2,500.00	\$2,500.00	\$2,500.00	\$2,500.00	\$2,500.00	\$30,000.00			
Staff Development	\$7,000.00	\$583.33	\$583.33	\$583.33	\$583.33	\$583.33	\$583.33	\$583.33	\$583.33	\$583.33	\$583.33	\$583.33	\$583.33	\$7,000.00			
IT	\$10,000.00	\$833.33	\$833.33	\$833.33	\$833.33	\$833.33	\$833.33	\$833.33	\$833.33	\$833.33	\$833.33	\$833.33	\$833.33	\$10,000.00			
Total Service Contracts	\$262,520.00	\$8,916.67	\$8,916.67	\$26,196.67	\$26,196.67	\$26,196.67	\$26,196.67	\$26,196.67	\$26,196.67	\$26,196.67	\$26,196.67	\$26,196.67	\$26,196.67	\$8,916.67	\$262,520.00		
F. Supplies & Materials																	
Advertising	\$10,000.00	\$833.33	\$833.33	\$833.33	\$833.33	\$833.33	\$833.33	\$833.33	\$833.33	\$833.33	\$833.33	\$833.33	\$833.33	\$10,000.00			
Computer Software	\$4,000.00	\$333.33	\$333.33	\$333.33	\$333.33	\$333.33	\$333.33	\$333.33	\$333.33	\$333.33	\$333.33	\$333.33	\$333.33	\$4,000.00			
Custodial Supplies	\$8,000.00	\$666.67	\$666.67	\$666.67	\$666.67	\$666.67	\$666.67	\$666.67	\$666.67	\$666.67	\$666.67	\$666.67	\$666.67	\$8,000.00			
Instructional Supplies	\$80,000.00	\$6,666.67	\$6,666.67	\$6,666.67	\$6,666.67	\$6,666.67	\$6,666.67	\$6,666.67	\$6,666.67	\$6,666.67	\$6,666.67	\$6,666.67	\$6,666.67	\$80,000.00			

Library Books	\$4,000.00	\$333.33	\$333.33	\$333.33	\$333.33	\$333.33	\$333.33	\$333.33	\$333.33	\$333.33	\$333.33	\$333.33	\$333.33	\$333.33	\$333.33	\$4,000.00
Office Supplies & Expense	\$15,000.00	\$1,250.00	\$1,250.00	\$1,250.00	\$1,250.00	\$1,250.00	\$1,250.00	\$1,250.00	\$1,250.00	\$1,250.00	\$1,250.00	\$1,250.00	\$1,250.00	\$1,250.00	\$1,250.00	\$15,000.00
Postage	\$3,000.00	\$250.00	\$250.00	\$250.00	\$250.00	\$250.00	\$250.00	\$250.00	\$250.00	\$250.00	\$250.00	\$250.00	\$250.00	\$250.00	\$250.00	\$3,000.00
Printing	\$5,000.00	\$416.67	\$416.67	\$416.67	\$416.67	\$416.67	\$416.67	\$416.67	\$416.67	\$416.67	\$416.67	\$416.67	\$416.67	\$416.67	\$416.67	\$5,000.00
Subscriptions	\$1,500.00	\$125.00	\$125.00	\$125.00	\$125.00	\$125.00	\$125.00	\$125.00	\$125.00	\$125.00	\$125.00	\$125.00	\$125.00	\$125.00	\$125.00	\$1,500.00
Testing & Evaluation Supplies	\$3,864.00	\$322.00	\$322.00	\$322.00	\$322.00	\$322.00	\$322.00	\$322.00	\$322.00	\$322.00	\$322.00	\$322.00	\$322.00	\$322.00	\$322.00	\$3,864.00
Textbooks	\$10,000.00	\$833.33	\$833.33	\$833.33	\$833.33	\$833.33	\$833.33	\$833.33	\$833.33	\$833.33	\$833.33	\$833.33	\$833.33	\$833.33	\$833.33	\$10,000.00
Other Supplies & Materials	\$20,000.00	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$20,000.00
Total Supplies & Materials	\$164,364.00	\$13,697.00	\$13,697.00	\$13,697.00	\$13,697.00	\$13,697.00	\$13,697.00	\$13,697.00	\$13,697.00	\$13,697.00	\$13,697.00	\$13,697.00	\$13,697.00	\$13,697.00	\$13,697.00	\$164,364.00
<i>G. Capital Outlay</i>																
Computer Hardware	\$10,000.00	\$833.33	\$833.33	\$833.33	\$833.33	\$833.33	\$833.33	\$833.33	\$833.33	\$833.33	\$833.33	\$833.33	\$833.33	\$833.33	\$833.33	\$10,000.00
Computer Software	\$5,000.00	\$416.67	\$416.67	\$416.67	\$416.67	\$416.67	\$416.67	\$416.67	\$416.67	\$416.67	\$416.67	\$416.67	\$416.67	\$416.67	\$416.67	\$5,000.00
Office Furniture & Equipment	\$5,000.00	\$416.67	\$416.67	\$416.67	\$416.67	\$416.67	\$416.67	\$416.67	\$416.67	\$416.67	\$416.67	\$416.67	\$416.67	\$416.67	\$416.67	\$5,000.00
Instructional Furniture & Equipment	\$20,000.00	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$1,666.67	\$20,000.00
Vehicles	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Land Purchases	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Improvements & Alterations	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Other Capital Outlay	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total Capital Outlay	\$40,000.00	\$3,333.33	\$3,333.33	\$3,333.33	\$3,333.33	\$3,333.33	\$3,333.33	\$3,333.33	\$3,333.33	\$3,333.33	\$3,333.33	\$3,333.33	\$3,333.33	\$3,333.33	\$3,333.33	\$40,000.00
<i>H. Other Expenditures</i>																
Audit Expense	\$7,000.00	\$583.33	\$583.33	\$583.33	\$583.33	\$583.33	\$583.33	\$583.33	\$583.33	\$583.33	\$583.33	\$583.33	\$583.33	\$583.33	\$583.33	\$7,000.00
Dues & Fees	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Travel Expense/Mileage	\$3,000.00	\$250.00	\$250.00	\$250.00	\$250.00	\$250.00	\$250.00	\$250.00	\$250.00	\$250.00	\$250.00	\$250.00	\$250.00	\$250.00	\$250.00	\$3,000.00
Field Trips	\$7,500.00	\$625.00	\$625.00	\$625.00	\$625.00	\$625.00	\$625.00	\$625.00	\$625.00	\$625.00	\$625.00	\$625.00	\$625.00	\$625.00	\$625.00	\$7,500.00
BSU Administrative Fee	\$14,472.00	\$1,206.00	\$1,206.00	\$1,206.00	\$1,206.00	\$1,206.00	\$1,206.00	\$1,206.00	\$1,206.00	\$1,206.00	\$1,206.00	\$1,206.00	\$1,206.00	\$1,206.00	\$1,206.00	\$14,472.00
Total Other Expenditures	\$31,972.00	\$2,081.00	\$2,081.00	\$4,162.00	\$4,162.00	\$2,081.00	\$2,081.00	\$2,081.00	\$2,081.00	\$2,081.00	\$2,081.00	\$2,081.00	\$2,081.00	\$2,081.00	\$2,081.00	\$31,972.00
TOTAL EXPENDITURES	\$1,965,156.00	\$80,428.00	\$150,219.67	\$169,580.67	\$169,580.67	\$167,499.67	\$167,499.67	\$167,499.67	\$167,499.67	\$167,499.67	\$167,499.67	\$167,499.67	\$167,499.67	\$167,499.67	\$220,011.33	\$1,965,156.00
REMAINING CASH BALANCE (DEFICIT)	\$24,868.00	\$2,447.33	\$2,655.67	\$574.67	\$574.67	\$2,655.67	\$2,655.67	\$2,655.67	\$2,655.67	\$2,655.67	\$2,655.67	\$2,655.67	\$2,655.67	\$2,655.67	\$2,864.00	\$24,868.00

Budget Worksheet						
Projected Five Year Cash Flow						
	School Name: Montessori Academy Preparatory Academy					
	Pre-operational (From Schedule A)	First Fiscal Year	Second Fiscal Year	Third Fiscal Year:	Fourth Fiscal Year:	Fifth Fiscal Year:
Dates Covered	Approval - June 30, 2020	7/1/20-6/30/21	7/1/21-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24
Projected Enrollment		216	216	216	216	216
Minimum enrollment for financial viability		216	216	216	216	216
CARRY OVER		\$0.00	\$24,868.00	\$7,368.00	\$8,368.00	\$17,808.00
I. CASH IN (INCOME):						
Donations/Gifts	\$10,000.00	\$20,000.00	\$40,000.00	\$80,000.00	\$100,000.00	\$120,000.00
Food Service		\$155,520.00	\$155,520.00	\$155,520.00	\$155,520.00	\$155,520.00
Investment Earnings						
Loan From Common School Loan		\$35,000.00	\$35,000.00	\$35,000.00	\$35,000.00	\$35,000.00
Other Grants	\$200,000.00	\$400,000.00	\$400,000.00	\$400,000.00	\$430,000.00	\$430,000.00
State Grants						
State Tuition Support		\$1,316,304.00	\$1,316,304.00	\$1,316,304.00	\$1,316,304.00	\$1,316,304.00
E-Rate		\$20,000.00	\$20,000.00	\$20,000.00	\$20,000.00	\$20,000.00
Transportation						
Student Fees: \$200 per student		\$43,200.00	\$43,200.00	\$43,200.00	\$43,200.00	\$43,200.00
TOTAL CASH IN (INCOME):	\$210,000.00	\$1,990,024.00	\$2,010,024.00	\$2,050,024.00	\$2,100,024.00	\$2,120,024.00

Five Year Cash Flow by Detail						
Projected Enrollment:	216	School Name:	Montessori Academy Preparatory School			
	Preoperational	2020	2021	2022	2023	2024
I. CASH IN (INCOME):						
Donations/Gifts (Please Describe)	\$10,000	\$20,000	\$40,000	\$80,000	\$100,000	\$120,000
Food Service		\$155,520	\$155,520	\$155,520	\$155,520	\$155,520
Investment Earnings		\$0	\$0	\$0	\$0	\$0
Loan From Common School Loan		\$35,000	\$35,000	\$35,000	\$35,000	\$35,000
Other Grants	\$200,000	\$400,000	\$400,000	\$400,000	\$430,000	\$430,000
State Grants (Please Describe)		\$0	\$0	\$0	\$0	\$0
State Tuition Support		\$1,316,304	\$1,316,304	\$1,316,304	\$1,316,304	\$1,316,304
E-Rate		\$20,000	\$20,000	\$20,000	\$20,000	\$20,000
Transportation		\$0	\$0	\$0	\$0	\$0
Student Fees: \$200 per student		\$43,200	\$43,200	\$43,200	\$43,200	\$43,200
TOTAL CASH IN (INCOME):	\$210,000.00	\$1,990,024.00	\$2,010,024.00	\$2,050,024.00	\$2,100,024.00	\$2,120,024.00
II. EXPENDITURES:						
<i>A. Employee Salaries</i>						
Director/Principal		\$70,000	\$72,800	\$75,712	\$78,740	\$81,890
Director of Finance/Operations		\$50,000	\$52,000	\$54,080	\$56,243	\$58,493
Classroom Assistants						
8 classroom assistants; salary of \$30,000 each.		\$240,000	\$249,600	\$259,584	\$269,967	\$280,766
Admin Assistant		\$30,000	\$31,200	\$32,448	\$33,746	\$30,000
Teachers:						
8 teachers; salary at \$45,000 each.		\$360,000	\$374,400	\$389,376	\$404,951	\$421,149
Total Employee Salaries	\$0.00	\$750,000.00	\$780,000.00	\$811,200.00	\$843,648.00	\$872,298.16
<i>B. Employee Benefits</i>						
25% of salaries to be used for FICA, health insurance, unemployment, retirement, worker's comp, life insurance.	\$0	\$187,500	\$195,000	\$202,800	\$210,912	\$218,075
Total Employee Benefits	\$0.00	\$187,500.00	\$195,000.00	\$202,800.00	\$210,912.00	\$218,074.54
<i>C. Rental of Facilities & Utilities</i>						
Lease: Zionsville/Carmel						
\$21,000 per month. Include costs for occupancy, CAM, renovations.	\$5,000	\$252,000	\$252,000	\$252,000	\$252,000	\$252,000
Lease: Indianapolis						
\$16,000 per month. Include costs for occupancy, CAM, renovations.	\$5,000	\$192,000	\$192,000	\$192,000	\$192,000	\$192,000
Internet Access		\$8,000.00	\$8,000.00	\$8,000.00	\$8,000.00	\$8,000.00
Repair & Maintenance Services		\$60,000.00	\$60,000.00	\$60,000.00	\$60,000.00	\$60,000.00
Phone		\$4,800.00	\$4,800.00	\$4,800.00	\$4,800.00	\$4,800.00
Total Rent and Utilities	\$10,000.00	\$516,800.00	\$516,800.00	\$516,800.00	\$516,800.00	\$516,800.00
<i>D. Insurance:</i>						
Board Errors and Omissions, General Liability Insurance. Property & Casualty Insurance	\$10,000.00	\$12,000.00	\$12,000.00	\$12,000.00	\$12,000.00	\$12,000.00
Theft Insurance, Umbrella/excess Liability, Criminal						
Total Insurance	\$10,000.00	\$12,000.00	\$12,000.00	\$12,000.00	\$12,000.00	\$12,000.00
<i>E. Service Contracts</i>						
Accounting & Payroll Services		\$6,000.00	\$6,000.00	\$6,000.00	\$6,000.00	\$6,000.00
Consulting Services	\$150,000.00	\$20,000.00	\$20,000.00	\$20,000.00	\$20,000.00	\$20,000.00
Equipment Rental & Lease		\$10,000.00	\$10,000.00	\$10,000.00	\$10,000.00	\$10,000.00
Food Service Contract		\$155,520.00	\$155,520.00	\$155,520.00	\$155,520.00	\$155,520.00
Legal Services	\$4,000.00	\$4,000.00	\$4,000.00	\$4,000.00	\$4,000.00	\$4,000.00
Professional & Technical Services	\$4,000.00	\$20,000.00	\$20,000.00	\$20,000.00	\$20,000.00	\$20,000.00
Pupil Transportation Contract		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Security Services		\$30,000.00	\$30,000.00	\$30,000.00	\$30,000.00	\$30,000.00
Staff Development		\$7,000.00	\$7,000.00	\$7,000.00	\$7,000.00	\$7,000.00
IT		\$10,000.00	\$10,000.00	\$10,000.00	\$10,000.00	\$10,000.00
Total Service Contracts	\$158,000.00	\$262,520.00	\$262,520.00	\$262,520.00	\$262,520.00	\$262,520.00

<i>F. Supplies & Materials</i>						
Advertising	\$10,000.00	\$10,000.00	\$10,000.00	\$10,000.00	\$10,000.00	\$10,000.00
Computer Software		\$4,000.00	\$4,000.00	\$4,000.00	\$4,000.00	\$4,000.00
Custodial Supplies		\$8,000.00	\$8,000.00	\$8,000.00	\$8,000.00	\$8,000.00
Instructional Supplies		\$80,000.00	\$80,000.00	\$80,000.00	\$80,000.00	\$80,000.00
Library Books		\$4,000.00	\$4,000.00	\$4,000.00	\$4,000.00	\$4,000.00
Office Supplies & Expense		\$15,000.00	\$15,000.00	\$15,000.00	\$15,000.00	\$15,000.00
Postage		\$3,000.00	\$3,000.00	\$3,000.00	\$3,000.00	\$3,000.00
Printing		\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00
Subscriptions		\$1,500.00	\$1,500.00	\$1,500.00	\$1,500.00	\$1,500.00
Testing & Evaluation Supplies		\$3,864.00	\$3,864.00	\$3,864.00	\$3,864.00	\$3,864.00
Textbooks		\$10,000.00	\$10,000.00	\$10,000.00	\$10,000.00	\$10,000.00
Other Supplies & Materials	\$22,000.00	\$20,000.00	\$20,000.00	\$20,000.00	\$20,000.00	\$20,000.00
Total Supplies & Materials	\$32,000.00	\$164,364.00	\$164,364.00	\$164,364.00	\$164,364.00	\$164,364.00
<i>G. Capital Outlay</i>						
Computer Hardware		\$10,000.00	\$10,000.00	\$10,000.00	\$10,000.00	\$10,000.00
Computer Software		\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00
Office Furniture & Equipment		\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00
Instructional Furniture & Equipment		\$20,000.00	\$20,000.00	\$20,000.00	\$20,000.00	\$20,000.00
Vehicles		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Land Purchases		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Improvements & Alterations		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Other Capital Outlay		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total Capital Outlay	\$0.00	\$40,000.00	\$40,000.00	\$40,000.00	\$40,000.00	\$40,000.00
<i>H. Other Expenditures</i>						
Audit Expense		\$7,000.00	\$7,000.00	\$7,000.00	\$7,000.00	\$7,000.00
Dues & Fees		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Travel Expense/Mileage		\$3,000.00	\$3,000.00	\$3,000.00	\$3,000.00	\$3,000.00
Field Trips		\$7,500.00	\$7,500.00	\$7,500.00	\$7,500.00	\$7,500.00
BSU Administrative Fee		\$14,472.00	\$14,472.00	\$14,472.00	\$14,472.00	\$14,472.00
Total Other Expenditures	\$0.00	\$31,972.00	\$31,972.00	\$31,972.00	\$31,972.00	\$31,972.00
TOTAL EXPENDITURES	\$210,000.00	\$1,965,156.00	\$2,002,656.00	\$2,041,656.00	\$2,082,216.00	\$2,118,028.70
REMAINING CASH BALANCE (DEFICIT)	\$0.00	\$24,868.00	\$7,368.00	\$8,368.00	\$17,808.00	\$1,995.30

Preoperational Year		
SCHOOL NAME:	Montessori Academy Preparatory School	7/1/19 - 6/30/20
INCOME		
Cash In -- Funding Source	Budget Amount	Description: Specific Source
State Grants (Please Describe)		
Other Grants (Please Describe)	\$200,000	Charter School Start-Up Grant
Investment Earnings		
Donations/Gifts (Please Describe)		
Other (Please Describe)	\$10,000	In-Kind
TOTAL CASH IN (INCOME)	\$210,000.00	
EXPENSES		
Expenditure	Budget Amount	Description: Assumptions
Legal	\$4,000	Legal
Accounting and Consulting	\$4,000	Financial services.
Filing		
Fundraising		
Marketing: Including Printing and Postage	\$10,000	Marketing/Outreach
Rent: Office Space and Utilities	\$10,000	In-Kind
Supplies	\$10,000	Insurance
Equipment		
Labor	\$150,000	Staff
Other (Please Describe)	\$22,000	Contingency
TOTAL EXPENSES	\$210,000	

Attachment 25

Budget Assumptions

Notes:

- This document provides additional detail for key assumptions driving the budget, where needed.
- Revenue success is contingent upon execution of fundraising plan, with growth situated around donations and grant solicitation.
- Expenses are consistent from year to year but for employee salaries and benefits (which increase 4% each year).

Preoperational year

Revenue: \$210,000

- In-Kind: \$10,000 of space to work.
- Grants: CSP Quality Counts Grant: \$200,000.

Expenses: \$210,000

- Chair/CEO: \$50,000: To provide leadership.
- Education Consultant: \$50,000. To refine academic model.
- Board Consultant: \$50,000. To refine board/school operations.
- Marketing \$10,000: To promote school.
- Legal: \$4,000: To provide legal services.
- Finance: \$4,000: To provide financial services.
- In-Kind: \$10,000: Occupancy.
- Insurance: \$10,000: For insurance needs.
- Contingency \$22,000: To address unforeseen pre-operational needs.

Year One

Revenue: \$1,990,024

- Donations: \$20,000. Assumes beginning of donation and special events program.
- State: \$6,094.
- E-Rate: Assumes approval of \$20,000.
- Common School Loan Fund: \$35,000: Assumes successful applications.
- Food Service: \$155,200. Assumes cost of \$720 per student per year (cash or free/reduced lunch).
- Student Fees: \$43,200 (\$200 per student).
- Grants: \$400,000. Assumes successful applications to the following:
 - CSP Quality Counts Grant: \$300,000.
 - 1 government grant: \$50,000.
 - Other grants ranging from \$10,000 - \$20,000 - \$50,000.

Expenses: \$1,965,156

- Employee Salaries: \$750,000. These are all salaries to support staff plan.
- Benefits : \$187,500. These benefits to support staff plan.
- Rent/Utilities: \$516,000: Expenses for two Campuses – paid via lease.
- Insurance: \$12,000: Expenses for all insurance.
- Service Contracts: \$262,520.
 - Food Service: \$155,200. Assumes cost of \$720 per student per year (cash or free/reduced lunch).
- Supplies/Materials: \$164,364.
- Capital Outlay: \$40,000.
- Other: \$31,972.

Year Two

Revenue: \$2,010,024

- Donations: \$40,000. Assumes 100% increase from prior year
- State: \$6,094.
- E-Rate: Assumes approval of \$20,000.
- Common School Loan Fund: \$35,000: Assumes successful applications.
- Food Service: \$155,200. Assumes cost of \$720 per student per year (cash or free/reduced lunch).
- Student Fees: \$43,200 (\$200 per student).
- Grants: \$400,000. Assumes successful applications to the following:
 - CSP Quality Counts Grant: \$200,000.
 - 2 government grants: \$100,000.
 - \$200,000 in other grants ranging from \$10,000 - \$50,000.

Expenses: \$2,002,656

- Employee Salaries: \$780,000. These are all salaries to support staff plan. Assumes 4% increase from prior year.
- Benefits : \$195,000. These benefits to support staff plan. Assumes 4% increase from prior year.
- Rent/Utilities: \$516,000: Expenses for two Campuses – paid via lease.
- Insurance: \$12,000: Expenses for all insurance.
- Service Contracts: \$262,520.
 - Food Service: \$155,200. Assumes cost of \$720 per student per year (cash or free/reduced lunch).
- Supplies/Materials: \$164,364.
- Capital Outlay: \$40,000.
- Other: \$31,972.

Year Three

Revenue: \$2,050,024

- Donations: \$80,000. Assumes 100% increase from prior year.
- State: \$6,094.
- E-Rate: Assumes approval of \$20,000.
- Common School Loan Fund: \$35,000: Assumes successful applications.
- Food Service: \$155,200. Assumes cost of \$720 per student per year (cash or free/reduced lunch).
- Student Fees: \$43,200 (\$200 per student).
- Grants: \$400,000. Assumes successful applications to the following:
 - CSP Quality Counts Grant: \$200,000.
 - 2-3 government grants: \$100,000.
 - Other grants: \$100,000. Ranging from \$10,000 - \$50,000.

Expenses: \$2,041,656

- Employee Salaries: \$811,200. These are all salaries to support staff plan. Assumes 4% increase from prior year.
- Benefits : \$202,800. These benefits to support staff plan. Assumes 4% increase from prior year.
- Rent/Utilities: \$516,000: Expenses for two Campuses – paid via lease.
- Insurance: \$12,000: Expenses for all insurance.
- Service Contracts: \$262,520.
 - Food Service: \$155,200. Assumes cost of \$720 per student per year (cash or free/reduced lunch).
- Supplies/Materials: \$164,364.
- Capital Outlay: \$40,000.
- Other: \$31,972.

Year Four

Revenue: \$2,100,024

- Donations: \$100,000. Assumes 25% increase from prior year.
- State: \$6,094.
- E-Rate: Assumes approval of \$20,000.
- Common School Loan Fund: \$35,000: Assumes successful applications.
- Food Service: \$155,200. Assumes cost of \$720 per student per year (cash or free/reduced lunch).
- Student Fees: \$43,200 (\$200 per student).
- Grants: \$430,000. Assumes successful applications to the following:
 - 2-3 government grants: \$200,000
 - Other grants: \$230,000. Ranging from \$10,000 - \$50,000.

Expenses: \$2,082,216

- Employee Salaries: \$843,648. These are all salaries to support staff plan. Assumes 4% increase from prior year.
- Benefits : \$210,912. These benefits to support staff plan. Assumes 4% increase from prior year.
- Rent/Utilities: \$516,000: Expenses for two Campuses – paid via lease.
- Insurance: \$12,000: Expenses for all insurance.
- Service Contracts: \$262,520.
 - Food Service: \$155,200. Assumes cost of \$720 per student per year (cash or free/reduced lunch).
- Supplies/Materials: \$164,364.
- Capital Outlay: \$40,000.
- Other: \$31,972.

Year Five

Revenue: \$2,120,024

- Donations: \$120,000. Assumes 20% increase from prior year.
- State: \$6,094.
- E-Rate: Assumes approval of \$20,000.
- Common School Loan Fund: \$35,000: Assumes successful applications.
- Food Service: \$155,200. Assumes cost of \$720 per student per year (cash or free/reduced lunch).
- Student Fees: \$43,200 (\$200 per student).
- Grants: \$430,000. Assumes successful applications to the following:
 - 2-3 government grants: \$200,000
 - Other grants: \$230,000. Ranging from \$10,000 - \$50,000.

Expenses: \$2,118,028

- Employee Salaries: \$872,298.16. These are all salaries to support staff plan. Assumes 4% increase from prior year.
- Benefits : \$218,074.54. These benefits to support staff plan. Assumes 4% increase from prior year.
- Rent/Utilities: \$516,000: Expenses for two Campuses – paid via lease.
- Insurance: \$12,000: Expenses for all insurance.
- Service Contracts: \$262,520.
 - Food Service: \$155,200. Assumes cost of \$720 per student per year (cash or free/reduced lunch).
- Supplies/Materials: \$164,364.
- Capital Outlay: \$40,000.
- Other: \$31,972.

Attachment 26

Financial Statements.

Please note that the MEC has not net conducted an audit due to the amounts of its annual receipts.

The Montessori Educational Charity Inc.

Profit & Loss

January through December 2018

	Jan - Dec 18
Ordinary Income/Expense	
Income	
Direct Public Support	
Lily Endowment	6,000.00
MMIA & Parents Contributions	6,570.64
Total Direct Public Support	12,570.64
Total Income	12,570.64
Expense	
Advertising & Marketing	1,383.75
Bank Service Charges	181.00
Contract Services	960.00
Facilities and Equipment	
Repairs and Maintenance	53.39
Total Facilities and Equipment	53.39
Office Expense	1,301.39
Operations	
Computer and Software Expense	2,790.00
Supplies	40.55
Total Operations	2,830.55
Professional Fees	
Legal	1,500.00
Total Professional Fees	1,500.00
Program Activities	2.50
Program Supplies	1,203.34
Teachers Development	540.00
Travel and Meetings	
Meals	207.54
Travel	495.57
Total Travel and Meetings	703.11
Total Expense	10,659.03
Net Ordinary Income	1,911.61
Net Income	1,911.61

The Montessori Educational Charity Inc.

Profit & Loss

January through December 2017

	<u>Jan - Dec 17</u>
Ordinary Income/Expense	
Income	
Direct Public Support	
Lily Endowment	6,500.00
MMIA & Parents Contributions	<u>3,724.47</u>
Total Direct Public Support	<u>10,224.47</u>
Total Income	<u>10,224.47</u>
Expense	
Advertising & Marketing	779.50
Bank Service Charges	258.42
Business Expenses	
Business Registration Fees	<u>21.00</u>
Total Business Expenses	<u>21.00</u>
Contract Services	470.00
Facilities and Equipment	
Repairs and Maintenance	<u>50.65</u>
Total Facilities and Equipment	<u>50.65</u>
Office Expense	499.45
Operations	
Computer and Software Expense	700.00
Supplies	<u>128.81</u>
Total Operations	<u>828.81</u>
Program Activities	1,588.14
Program Supplies	1,979.00
Travel and Meetings	
Meals	<u>474.39</u>
Total Travel and Meetings	<u>474.39</u>
Total Expense	<u>6,949.36</u>
Net Ordinary Income	<u>3,275.11</u>
Net Income	<u><u>3,275.11</u></u>

The Montessori Educational Charity Inc.
Profit & Loss
January through December 2016

	<u>Jan - Dec 16</u>
Ordinary Income/Expense	
Income	
Direct Public Support	6,500.00
Lily Endowment	18,799.00
MMIA & Parents Contributions	
	<u>25,299.00</u>
Total Direct Public Support	<u>25,299.00</u>
Total Income	
Expense	
Bank Service Charges	150.00
Contract Services	4,600.00
Facilities and Equipment	
Repairs and Maintenance	<u>644.48</u>
	644.48
Total Facilities and Equipment	352.59
Office Expense	24.33
Postage	687.00
Program Activities	11,777.22
Program Supplies	
Travel and Meetings	
Educational Training	3,830.00
Meals	<u>219.93</u>
	4,049.93
Total Travel and Meetings	<u>22,285.55</u>
Total Expense	<u>3,013.45</u>
Net Ordinary Income	<u>3,013.45</u>
Net Income	<u><u>3,013.45</u></u>