

SUBJECT

Monticello Montessori Charter School Proposed Charter Amendment

APPLICABLE STATUTE, RULE, OR POLICY

I.C. §33-5206(8)
IDAPA 08.02.04.302

BACKGROUND

Monticello Montessori Charter School (MMCS) is a public charter school authorized by the Public Charter School Commission (PCSC) and located in Ammon since 2010. MMCS currently serves students in grades K-6.

DISCUSSION

MMCS is proposing a charter amendment that would expand the grade levels served to include 7th and 8th grades. If the amendment is approved, the school plans to enroll an additional 20 students in a mixed age, middle school classroom for the 2018-19 school year. MMCS's current enrollment is lower than its overall cap, though it saw an increase in the past year after several years of declining enrollment. The school believes that offering middle grades will increase retention in the lower grades.

The proposed middle school would offer a project-based curriculum, which is intended to dovetail with the Montessori curriculum offered in the school's elementary classrooms. The school plans to provide core subject instruction directly while utilizing Idaho Digital Learning Academy courses for electives, as well as remedial and advanced offerings.

MMCS would house its middle school in a new, portable classroom on its existing site. Additional portable space would be rented to accommodate office and special services needs. Associated budgetary projections and documentation indicate that the expansion plan, including the facility proposal, are reasonable.

As part of the performance certificate development process, the PCSC approved a general standard that schools with an accountability designation of good standing or honor are eligible for consideration of expansion proposals. Monticello was in good standing on its most recent annual report, and the PCSC granted the school a non-conditional renewal on March 1, 2018.

IMPACT

If the PCSC approves the proposed amendments, relevant modifications to the performance certificate will be adopted accordingly, and MMCS will immediately begin operating under the amended charter and performance certificate.

June 14, 2018

If the PCSC denies the amendments, MMCS could appeal this decision to the State Board of Education, or could decide not to proceed any further.

STAFF COMMENTS AND RECOMMENDATIONS

PCSC staff recommends approval of the charter amendment proposed by MMCS.

COMMISSION ACTION

A motion to approve the proposed charter amendment as submitted by Monticello Montessori Charter School related to expansion into middle school grades.

OR

A motion to deny the proposed charter amendment as submitted by Monticello Montessori Charter School on the following grounds _____.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

May 8, 2018

Monticello Montessori Charter School District No. 474
4707 South Sweetwater Way
Ammon, Idaho 83406

Public Charter School Commission
Borah Building
304 N 8th Street Room 242
Boise, ID 83702

Dear Public Charter School Commission:

Since 2010 Monticello Montessori Charter School District Number 474 has offered high quality Montessori education to children in Bonneville, Bingham and Jefferson Counties. Located within City of Ammon limits in Bonneville County, and serving an average 200 students per year, the school operates on a six-plus acre campus in a building mortgaged through Bank of Idaho and USDA.

The founders' vision was to offer authentic Montessori education in a publicly funded program. Montessori schooling is known for fostering creativity, social/emotional development, independence in learning, and multisensory methods of mastering complex concepts. The Montessori Method, which fosters students' intrinsic motivation and provides an environment that encourages the child to work independently and progressing at his own pace, is known worldwide as a program for the world's well-to-do. Monticello offers this program at no charge to all students in its charter area. Typically, 50–60% of district students qualify as low-income and eligible for free and reduced lunch.

Monticello's Board of Directors plan to grow the school to include 7th and 8th grades- an intention voiced in original Charter language. The Board recognizes that there is no philosophically compatible middle school option in our area, but the motivation for this proposal comes from school parents. They are concerned about the impact of the typical traditional junior high school on their children's intellectual and emotional development, and about their losing the highly individualized, intrinsically motivated and cooperative learning Monticello's students are used to. School parents formed a committee several years ago to find a suitable solution. They proposed that Monticello expand to K-8, since all other public offerings are traditional book-and-seat based. They selected high-quality project based learning as the most Montessori-compatible middle school model.

Monticello's expansion request is timely. Steadily increasing population driven by economic growth in Bonneville County is straining area schools. Population in Ammon alone has continued to grow steadily at 9.8% per year since the 2010 Census, and Districts 91 and 93 have continued to see an average increase of nearly 400 students per year for the past decade.¹ In March 2018, District 93 passed a bond for a new junior high school to open in the summer of 2021 in response to the area's growing population demands.² Also the county's real estate market continues as high demand and low supply. New home starts are not able to keep up with demand³, and several new housing developments are currently being built near Monticello. District 93 elementary schools are more than full. Not only is our area growing and the need

for schools increasing, there is continued strong demand for nontraditional programs and schools of choice, as evidenced by the number of parents who put their child's name on several charter school waiting lists, in hopes of having a viable option other than their local district school. Altogether these socio-economic conditions are favorable to Monticello's middle school proposal.

Expansion capacity at Monticello has been limited in the past by a shortage of classroom and ancillary space. However, this spring, Monticello is finalizing plans for installing temporary modular buildings to provide both ancillary office and classroom space. In year two, Monticello will add a second middle school class, however, the school will begin its middle school program with at most 20 students, carefully crafting the habits and patterns of learning in which students will follow their curiosity, use their multiple senses in real-world contexts, and delve into critical thinking and discovery learning. We know that an intellectually stimulating environment that fosters curiosity, collaborative problem solving and reflection and that leads to a public product is the essence of Montessori education in the third plane of development (adolescence).

The school will provide teacher-led instruction in core subjects, and internet-based courses to provide for elective options and any required remedial coursework. Idaho Core Standards will continue to be the basic learning targets in all Monticello's classrooms. Students will have access to individual computers in the middle school, which classrooms will be equipped with projectors, document cameras, and other ed-tech devices. Monticello plans to begin seeking middle school accreditation through AdvancEd the second year.

As of the close of the open enrollment period, just prior to the school's lottery, Monticello had 150 returning students for fall 2018. The school admitted 103 students through its lottery process held April 26, 2018. As of May 10, 2018 Monticello has 36 students remaining on its Waiting List.

Additionally, the school has been contacted by sixteen (16) 7th and 8th grade students' parents who have expressed interest in attending Monticello's middle school program should the district's expansion proposal be approved by the Charter Commission. We believe that once we have word of confirmation, applications will quickly fill the remaining available openings.

We are happy to answer any questions you may have.

Thank you for your consideration,

Erica Kemery

Erica Kemery, ED.S., Superintendent and Principal
Monticello Montessori Charter School District No. 474
administrator@monticellomontessori.com
208-419-0742

1. www.eastidahonews.com/2018/03/voters-pass-35-million-bond-district-93/ accessed May 7, 2018
2. Bonneville Joint School District 93, Board of Trustees, Regular Meeting March 14, 2018 Minutes, <https://lf.d93.k12.id.us/WebLink/0/edoc/504753/03-14-2018%20Minutes%20Regular%20Meeting.pdf> accessed May 7, 2018
3. www.postregister.com/articles/features-news-email/2018/03/03/real-estate-demand-eastern-idaho-putting-crunch accessed May 7, 2018

CHARTER OF MONTICELLO MONTESSORI SCHOOL

A Public Montessori Charter School

BEFORE THE IDAHO PUBLIC CHARTER SCHOOL COMMISSION

Opened Fall, 2010

Proposed Revision of Charter 2018

Attendance Area:
Bonneville, Bingham, and Jefferson Counties

School Building Location:
4707 S Sweet Water Way
Ammon, ID 83406

Submitted By:

Monticello Montessori Board of Trustees
administrator@monticellomontessori.com

4704 S Sweetwater Way
Ammon, ID 83406
(208) 419-0742

“Any child who is self-sufficient, ... ~~who can tie his shoes, dress or undress himself,~~ reflects in his joy and sense of achievement the image of human dignity, which is derived from a sense of independence.”

—Dr. Maria Montessori

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03. Tab 1 Articles of Incorporation, Mission, and Vision

A. File-Stamped Articles of Incorporation

Copies of Articles of Incorporation, file-stamped by the Idaho Secretary of State's Office; and of the signed Bylaws adopted by the board of directors of the Monticello are provided in Appendix A.

B. Petition Signatures of Qualified Electors

Copies of Signatures of at least thirty (30) qualified electors of Bonneville School District No. 93 and proof of qualification of electors are provided in Appendix B.

C. Mission and Vision Statements

Mission Statement:

Monticello Montessori helps students to become critical thinkers and intrinsically motivated learners. Critical Thinkers solve problems, clarify ideas, analyze arguments, and evaluate inductive, deductive, comparative, ideological and empirical reasoning. Motivated Learners desire to learn, engage problems, apply knowledge and achieve results.

Vision Statement:

Students attending Monticello will maximize their inner potentials and experience purpose and meaning in life by taking responsibility for their own education and cultivating personal dignity and independence through the Montessori approach to learning.

04. Tab 2 Proposed Operation and Potential Effects of the Charter School

A. Facilities

The administration/school building(s) shall be properly licensed and compliant with code with regard to the Americans with Disabilities Act, all OSHA regulations and with all applicable Idaho laws. The building shall provide sufficient wiring and communication capabilities to support the nature and infrastructure of the school. The building shall also provide adequate heating, ventilation, lighting, sanitary conditions, and water supply to support the school's staff and students.

In accordance with Montessori classroom design principles, classrooms shall allow a minimum of 35 square feet per student enrolled between the ages of 5 and 8. Ideally, but not required, classrooms for students between the ages of 9 and 12 allow 50 square feet per student enrolled. Classrooms shall provide an abundance of natural light from windows to the outdoor environment. The facility will accommodate the need for small kitchens and sinks in every most classrooms. The Charter Developers are currently exploring a variety of building options for the school to ensure sustainability of the program. The Charter Developers intend to build a permanent facility by 2015.

In 2009-2010 the school built a permanent facility where it has been located since.

As of 2017-2018 the school needs to add important educational facilities, the placement of several portable buildings will supply the needed classroom and ancillary space. In the future the school plans to add educational space for a multipurpose room to serve as a gymnasium and for other uses, with a small kitchen to support a lunch program, several additional classrooms, and added storage areas.

The school has a USDA loan and has been working with USDA on financing facility expansion. It appears that ~~Until financing can be secured for such a~~ expansion through extending the existing USDA loan is a viable option. ~~The school will likely lease a facility either from School District No. 93 or from a private entity. Details about the building plan, are included in Appendix J.~~

B. Administrative Services

Administrative services are selected and evaluated by the Monticello Board. Monticello teachers are employed by the school through the use of Idaho Standard Teacher Contracts. School personnel are required to hold the appropriate Idaho teaching certifications and endorsements. Monticello teachers hold highly-qualified status under federal requirements or are working toward that status in a state-approved program of

instruction. This may include state-approved alternative routes to certification such as through the American Board for Certification of Teacher Excellence (ABCTE).

*Monticello implements the following recommendations from the American Montessori Society's "Essential Elements of Successful Montessori Schools in the Public Sector:"**

- Employ an experienced Montessori teacher to serve as curriculum coordinator.
- Employ a building principal/educational leader who has knowledge of Montessori principles and curriculum through Montessori coursework, Montessori Administrator Credential and/or annual conference exposure.
- Maintain commitment to the core Montessori curriculum and instruction even with changes in administrative staff.

C. Potential Civil Liability Effects

Monticello is incorporated as a nonprofit public school with the Monticello Board listed as having the responsibilities and liabilities for the operation of the school. Idaho School Boards Association (ISBA) policies will serve as a basis for Monticello policy until the school's policies can be developed completely.

Monticello operates independently as a Local Education Agency (LEA). Monticello is responsible for its own operation including personnel matters, preparation of a budget, and contracting for services. Monticello maintains a policy of general liability insurance and all other types of insurance necessary to provide coverage for the potential losses described in this paragraph.

Monticello's employees, director, and officers shall enjoy the same immunities as employees, director, and officers of public school districts and other public schools.

Pursuant to 33-5204(2), Idaho Code, the Commission shall have no liability for the acts, omissions, debts or other obligations of Monticello. Monticello will defend, hold harmless and indemnify the Authorized Chartering Entity against any claim, action, loss, damage, injury, liability, cost or expense of any kind or nature arising out of the operation of Monticello and/or arising out of the acts or omissions of the agents, employees, invitees, or contractors of the school.

Copies of insurance binders from a company authorized to do business in Idaho for liability insurance (per occurrence and aggregate coverage), property insurance, worker's compensation insurance, unemployment insurance, and any other insurance will be provided to the Commission upon request. All required insurance will be in effect during the operation of Monticello.

* American Montessori Society. *Essential elements of successful Montessori schools in the public sector.*
<http://www.amshq.org/schoolExtras/publicEssentials.html>

D. Anticipated Impact on the Local School District and Community

Bonneville School District No. 93 has been experiencing steady growth since 1997. Two charter schools have opened over the past six years prior to Monticello opening, which served the District No. 93 attendance area with a total of 665 students enrolled in the charter schools as of the 2008/2009 school year. Even with these students not attending District No. 93 schools, the district passed a \$25 million bond for new school construction and improvement to accommodate the area's growth. The addition of Monticello Montessori to the attendance area will provide another school to serve this growing need.

There is an interest in the Montessori approach to learning in Bonneville County and the surrounding area. In Bonneville County and Jefferson County alone there are three-two private Montessori schools. These schools do a wonderful job; however the tuition fees make access to this type of education prohibitive, especially for the children who are most in need. ~~of it.~~ Monticello will provide a high-quality Montessori education to any child regardless of the family's financial situation.

05. Tab 3 Educational Program and Goals

A. Thoroughness Standards

Monticello's educational program and goals will fulfill each of the educational thoroughness standards, as defined in Section 33-1612, Idaho Code.

Standard 1: A safe environment conducive to learning is provided.

Goal: Monticello not only provides for the physical safety of students, but also for their emotional and intellectual safety. The learning environment enables students to feel comfortable taking emotional and intellectual risks.

Objectives:

- Procedures and guidelines for physical safety are included in this charter petition, Monticello policy, and the student handbook, including procedures for fire drills; city, state, and federal health, accessibility, safety, fire and building codes; zero tolerance for weapons, harassment, drugs and alcohol, and more.
- Students utilize work plans to give them a sense of control over their learning.
- Grades and labels are not used around students to make comparisons.

- Students advance through the curriculum at their own pace to minimize frustration.
- Failure is presented as something positive: the process of identifying incorrect or incomplete ideas. Persistence is the paramount virtue.
- Students are given specific lessons about how to respect the space and privacy of others, how to use the Montessori materials correctly, and how to keep their environment (the classroom) clean and uncluttered.

Standard 2: Educators are empowered to maintain classroom discipline.

Goal: Students will feel confident, interested in learning, and maintain a high standard of personal comportment. Teachers will preempt classroom discipline problems by identifying students' needs and making every effort to address them.

Objectives:

- Teachers utilize authentic Montessori materials which are inherently designed to attract the interest of children and create a meaningful context for learning
- The classroom environment is highly ordered to help students understand the sequence involved in their learning.
- School-wide expectations for student conduct and procedures for handling unacceptable behavior are clearly communicated in the Student Handbook
- Extrinsic rewards are not used in connection with academics
- The administrator supports teachers through ongoing training and by enforcing the Code of Conduct.

Standard 3: The basic values of honesty, self-discipline, unselfishness, respect for authority, and the central importance of work are emphasized.

Goal: The development of character and a strong work ethic are central to the Montessori approach. Students will have daily opportunities to share, respect personal space, work out differences appropriately, show self-discipline, and work hard.

Objectives:

- Character education is built in to the Montessori approach
- All faculty are trained to talk and behave in the same way when interacting with students
- Grace and courtesy are taught to students and modeled by faculty members
- Students care for their school, community, and world by helping to maintain facilities and by participating in local and global service projects

Standard 4: The skills necessary to communicate effectively are taught.

Goal: Students acquire written and verbal communication skills beginning with very simple, concrete skills, and expanding to more complex, abstract skills where nuance, climate, audience, timing, and cue are understood.

Objectives:

- Students work cooperatively with peers through peer tutoring and multi-aged, multi-graded grouping of students.
- Instruction in Reading and Language Arts with an emphasis on writing is provided.
- Students have a variety of opportunities to express themselves including giving speeches, writing letters, publishing essays, and working cooperatively.

Standard 5: A basic curriculum necessary to enable students to enter academic or professional-technical post-secondary educational programs is provided.

Goal: Monticello provides students with a high-quality Montessori approach to learning that meets or exceeds Idaho Core Standards.

Objectives:

- The American Montessori Society Montessori Scope and Sequence aligned to Idaho State Core Standards are is used as a the basis for what every child needs to know. From there, t
- The Montessori approach is utilized to help students master required knowledge and skills.
- In the middle school, Montessori materials will be applied as needed, while the chief approach to learning will be cross-curricular project-based methods that develop 21st century skills: collaboration, innovation, creative problem solving and information technology literacy. These methods will be applied in the context of engaging classical and nonfiction literature, a rigorous mathematics curriculum, social studies, science, and electives.
- The school understands this to be a sound and age-appropriate Montessori approach for middle school, in which abstract learning substantially transcends concrete approaches for most students, while high-quality project based learning provides intellectual engagement, authenticity, reflection, collaboration, and public product
- Every elementary student will have an individual work plan that is self-paced, while Middle School students, in preparation for high school and beyond, may have whole class assignments in which the elements of choice and independence, important to the Montessori method, continue to the maximum extent practical.
- A variety of resources will be used to address students' needs. The selection of resources including additional books, manipulatives, technological resources, etc. will be based on teacher observation, academic performance, IEP requirements, and parental input.

- Middle School students will use Idaho Digital Learning Academy or other online courses to fulfill elective options, credit recovery requirements, and advanced course options for high school credit.
- The Middle School will adopt a credit system, to be published in the Student Handbook. In compliance with State Board of Education Rules Governing Thoroughness IDAPA 08.02.03.107.01-02, Middle School students will be required to pass 80% of core courses and will have access to credit recovery courses and an alternate mechanism, to be determined by the Instructional Leadership Team, to be eligible for promotion to the next grade.
- Effectiveness of curriculum and instruction will be measured using multiple means, including portfolios, performance rubrics, standardized tests, and formative and summative assessments. The district uses IRI, ISAT and STAR testing data, along with performance on classroom work, periodic benchmark measures, and formative and summative assessments to determine skill proficiency.
- As part of accreditation expectations, middle school students will receive letter grades.

Standard 6: The skills necessary for the students to enter the workforce are taught.

Goal: The Montessori approach addresses the need in today's workforce for people who think creatively, take initiative, organize well, and adapt to rapid changes by instilling these attributes in students.

Objectives:

- Monticello utilizes a classroom design that is compatible with Montessori "prepared environment" principles.
- Students are given a great deal of control over what order and the amount of time they spend on subjects
- Monticello creates uninterrupted daily work periods of 90 minutes to 3-hours
- The classroom environment is highly ordered to teach students organizational skills
- Students help develop weekly work plans to learn planning and follow through

Standard 7: The students are introduced to current technology.

Goal: Technology is utilized to make the learning and teaching process more efficient.

Objectives:

- Wireless high-speed internet access is available in all classrooms.

- Laptops are utilized by teachers along with specialized software to track the progress of students.
- Systems are integrated to make communication of student data (i.e. progress reports, demographics, alerts and notifications, attendance, etc.) rapidly available and to reduce redundancies.
- Students in the ~~upper~~ elementary program will be taught how to use word processing and presentation software.
- Middle School students will have access to computers and digital devices as part of their regular course work requirements, and for use in online courses.
- Physical classroom materials and instruments (i.e. microscope) will be connected to digital cameras and/or LCD projectors where appropriate and necessary to enhance the learning experience for students.

Standard 8: The importance of students acquiring the skills to enable them to be responsible citizens of their homes, schools, and communities is emphasized.

Goal: In addition to their intellectual development, students acquire skills in practical life, grace and courtesy, art and music, as well as habits of healthy living, to become responsible citizens of their homes, schools, and communities.

Objectives:

- Montessori integrates specialty programs such as art and music as part of each student's aesthetic development.
- Project-based middle school learning in the Montessori environment integrates experiential learning such as agricultural, biological, geological, music, fabric, culinary or other arts/crafts-based endeavors.
- Students are ~~fed~~ provided or are encouraged to bring healthy whole food lunches and snacks while learning about food guides and the importance of nutrition and exercise.
- Practical life skills are taught such as how to wash dishes, sweep a floor, wipe down a table, tie shoes, care for clothing, and much more.
- Middle School curriculum includes occasional mini-economy projects in order to teach practical life skills related to economics and financial management.

B. The Educated Person in the 21st Century

Maria Montessori was a woman ahead of her time. In the early 20th century she stated, "What purpose would education serve in our days unless it helped man to a knowledge of the environment to which he has to adapt himself?" Ray Kurzweil, a noted futurist and New York Times bestselling author believes that by the middle of the 21st century there will be a "profound and disruptive transformation in human capability." According to Kurzweil computing will not be limited to laptops and handheld devices. It will be

environmental: “Computing will be everywhere: in the walls, in our furniture, in our clothing, and in our bodies and brains.”* He envisions a day when raw information will become a relatively common commodity that will literally be ‘downloadable’ into the brain. An educated person in the 21st century may have no use for schools that see themselves as being in the business of merely transmitting knowledge and information. Technology will do this far more efficiently. According to Maria Montessori, tomorrow’s schools “must take a new path, seeking the release of human potentialities.” Students in the 21st century need to possess the ability to interact adaptively with their environment (including their peers) and utilize raw information to creatively solve complex human problems. 21st century schools will be about helping people maximize their inner potentials and experience purpose and meaning in life.

C. Special Education Services

Monticello complies with the Individuals with Disabilities in Education Act (“IDEA”), Section 504 of the Rehabilitation Act (“Section 504”), and the Americans with Disabilities Act (“ADA”). Monticello is solely responsible for compliance with Section 504 and the ADA. Monticello works diligently to ensure full compliance with the IDEA. As an LEA, Monticello is responsible for assuring compliance with these programs.

Students with disabilities will be served according to federal and state laws regarding special education, including but not limited to Section 504 of the Rehabilitation Act (Section 504), the Americans with Disabilities Act (ADA), the Individuals with Disabilities Education Act (IDEA), and other applicable legislation. Monticello has a nondiscrimination policy with regard to admissions.

Students with disabilities will be served in accordance with their Individualized Education Programs (IEPs). All IEP’s will be developed by a certified special education teacher in accordance with all applicable laws and regulations.

Monticello will adhere to all provisions of federal law relating to students with disabilities, including the IDEA, Section 504 of the Rehabilitation Act of 1974, and Title II of the Americans with Disabilities Act of 1990, that are applicable to it. Expenses to educate students with disabilities that exceed federal reimbursements will be drawn from the general fund.

Monticello will, consistent with applicable law, work to ensure that all students with disabilities that qualify under the IDEA:

- Have available a free appropriate public education (FAPE)
- Are appropriately evaluated
- Receive an appropriate education in the least restrictive environment (LRE)

* Kurzweil, Ray. *The singularity is near: When humans transcend biology*. Penguin Group (USA) Inc., New York, NY, pp. 135-136.

- Are involved in the development of and decisions regarding the IEP, along with their parents
- Have access to appropriate procedures and mechanisms, along with their parents, to resolve any disputes or disagreements related to the school's provision of FAPE

Monticello Montessori will form a multidisciplinary team (consisting of a parent or guardian, the classroom teacher, the special education teacher, the school principal, and psychologists, therapists, or counselors as required) to consider a student's eligibility for special education. If the team determines the need for an evaluation by other personnel, such as a school psychologist, speech therapist, or occupational therapist not currently employed by the school, such evaluations will be contracted with a private provider or made possible through a cooperative arrangement with another school or district.

A special education teacher either employed full-time by the school or providing services on a contracted or part-time basis (depending on the number of students with IEPs) will be responsible to monitor Individual Education Plans (IEP) in multiple classrooms and supervise the implementation of IEPs as written. Certified teachers will provide services in an inclusion model to the extent possible depending on the degree of intervention necessary to meet the students' needs. Paraprofessionals will be used to support instruction as needed and allowed by IDEA and the ESEA. The special education teacher will consult with the general education staff to ensure they are utilizing effective classroom interventions, adaptations, and modifications. Generally the Montessori approach, being individualized in nature, will serve every child's needs completely in the regular education classroom.

D. Gifted and Talented Students

The Montessori learning approach meets the needs of Gifted and Talented (GATE) Students in the regular classroom—no separate program is necessary. Monticello shall identify and provide services to students who possess demonstrated or potential abilities that give evidence of high-performing capabilities. Monticello utilizes eligibility criteria developed by the Idaho Department of Education. The identification system aligns with the Gifted and Talented rules and regulations as identified by IDAPA 08.02.03.999.

Monticello's identification process for GATE students uses multiple indicators of giftedness with information obtained through the following methods and sources:

- Formal assessment methods, such as group and individual tests of achievement, general ability, specific aptitudes and creativity
- Informal assessment methods, such as checklists, rating scales, pupil product evaluations, observations, nominations, biographical data, questionnaires, and interviews.

- Information about students from multiple sources, such as teachers, counselors, peers, parents, community members, subject area experts, and the students themselves.

The Gifted and Talented Education (GATE) program will be supervised by a certificated staff member who holds the Gifted and Talented Endorsement, or has accrued credits in accredited Gifted and Talented coursework, or by a certificated staff member of another school through a cooperative arrangement.

Monticello uses the Federal definition of Children with Outstanding Talent:

“Children and youth with outstanding talent perform or show the potential for performance at remarkably high levels of accomplishment when compared with others of their age, experience, or environment. These children and youth exhibit high performance capability in intellectual, creative, and/or artistic areas, possess an unusual leadership capacity, or excel in specific academic fields. They require services or activities not ordinarily provided by the schools. Outstanding talents are present in children and youth from all cultural groups, across all economic strata, and in all areas of human endeavor.”*

E. Limited English Proficient Students

LEP students are English language learners (ELLs) who are specifically placed in a language development program, based on the home language survey (HLS) and the Idaho ELL Placement Test. As a public school, Monticello complies with Idaho Code in the identification and education of Limited English Proficient (LEP) students. Monticello will comply with all applicable federal law in regard to services and the education of LEP students. Monticello will develop and implement policies and procedures for the provision of services to LEP students in accordance with guidance published by the Office for Civil Rights of the U.S. Department of Education. These policies and procedures shall ensure the following:

- Identification of students who need assistance;
- Development of a program that in the view of experts in the field has a reasonable chance for success;
- Assurance that necessary staff, curricular materials and facilities are in place and used properly;
- Development of appropriate evaluation standards including program exit criteria for measuring the progress of students and assessing the success of the program and modify it where needed.

* Programs for Improvement of Practice. (1993). National Excellence: A Case for Developing America's Talent. (p. 26). Washington DC: US Department of Education, Office of Educational Research and Improvement. Available online: <http://www.ed.gov/pubs/DevTalent/part3.html>

Monticello will apply the federal definition of Limited English Proficient (LEP) as defined in Title III and IX of the ESEA. ELL students are identified by the home language survey (HLS) and the Idaho ELL Placement Test. Monticello teachers are trained in the use of the Sheltered Instruction Observation Protocol (SIOP) Model through the SIOP Institute. Teachers will implement SIOP instructional elements in daily lessons for ELL students. In the majority of cases, LEP students will have their needs met completely within the regular Montessori classroom. LEP services deemed necessary beyond what can be provided in the classroom may be contracted out or provided in a cooperative arrangement with another school or district. Students will begin transitioning out of the LEP program once they have achieved “proficiency” on Idaho’s English language proficiency assessment (LELA). Students will be exited from the LEP program once they have achieved “proficiency” on the LELA such assessment *and* have received an Idaho Reading Indicator (IRI) score of at least a 2; or an Idaho Standards Achievement Tests (ISATs) score that meets the “Basic” level; or have demonstrated access to mainstream content curriculum by showing consistent proficient scores on grade level benchmark unit assessments. Any additional state and federal testing required for ELL students attending charter schools will also be administered.

F. Dual Enrollment

Monticello students may participate in dual enrollment by attending classes offered by Bonneville Joint School District No. 93, as provided in Idaho Code 33-203 and Monticello policy.

06. Tab 4 Student Educational Standards, Testing and Accreditation

Maria Montessori believed that all children could learn. Over her lifetime she developed a solid instructional program that is highly sensorial and tactile; the curriculum provides hands-on learning materials for all subject areas and moves in an orderly fashion. Students are treated with great respect and given a great deal of freedom to guide their own learning within a highly structured and orderly environment. Montessori classrooms are beautiful, open spaces with furniture and shelves that accommodate the child’s size. Classrooms are arranged in areas, each area having “materials” (educational objects) that address particular subject areas. Each material has a specific purpose intended to teach children as they learn to use it correctly. Students learn to work cooperatively and also to respect the space and privacy of the individual.

Students will meet grade level learning targets. Age does not necessarily determine grade placement. Staff may use an evaluation tool to assist in determining grade placement. ~~They~~ Students do not advance by “grade” level but rather by from level to level through mastery of skills and content. A specific list of knowledge and skills that

students must master to move forward is subdivided into parts that can reasonably be taught and mastered within a year. This is a working tool for the teacher and student to collaborate about progress made. Rubrics Criteria are developed for all lessons to help teachers, students and parents know what mastery looks like. Students are ~~not~~ given letter grades, beginning in core subjects in 4th grade and increasing to all subjects in 6th through 8th grade. ~~Instead, t~~ Teachers and parents discuss what the child can actually do, and what ~~she~~ has yet to be mastered. Student achievement is based on giving children freedom within a structured and orderly environment. Students have the freedom to choose activities, but are responsible to structure their day to cover the curriculum and master its learning targets. Children receive lessons across the curriculum, collaborate with peers of their choosing, and report back about their findings in written papers or class speeches.

A. Measurable Student Educational Standards (MSES)

The Monticello Board, administration, and teaching staff share a vision for student success that is measurable, meaningful and aligned to the mission of the school.

MSES Standard 1

9 out of 10 students who maintain an average daily attendance of at least 96% will score at the “Proficient” or “Advanced” level in math, language, and reading on the Idaho Standards Achievement Test (ISAT) by the students’ third consecutive year of enrollment.

MSES Standard 2

At least 85% of students enrolled in the fall, who maintain an average daily attendance of at least 96% will obtain a score of 3 on the Idaho Reading Indicator (IRI) by the spring of their first year of enrollment.

B. Measuring Student Progress

Progress toward meeting each Monticello MSES will be evaluated on a regular basis so that the Monticello Board, administration, and teaching staff can assess to what extent the mission of the school is being fulfilled. Monticello teachers may utilize a variety of assessment methods, including authentic assessments, standardized tests, norm-referenced tests, criterion-referenced tests, and informal tests, to provide accurate feedback about student progress. Assessment methods are flexible to allow for different learning styles of students.

*Monticello will implement the following recommendations from the American Montessori Society's "Essential Elements of Successful Montessori Schools in the Public Sector:"**

- Use a process of reporting student progress that is compatible with Montessori and includes parent conferences and authentic assessment tools such as observation, portfolio, performance assessment with rubric, etc.
- Implement state mandated assessments in such a way that the character of the Montessori program is not compromised.

MSES Standard 1

9 out of 10 students who maintain an average daily attendance of at least 96% will score at the "Proficient" or "Advanced" level in math, language, and reading on the Idaho Standards Achievement Test (ISAT) by the students' third consecutive year of enrollment.

Evaluation Instrument and Methodology

Instrument: Idaho Standards Achievement Test (ISAT). The "Proficient" and "Advanced" spring ISAT scores of the students who have been enrolled for three consecutive years in Monticello will be counted and compared to the total number of 3rd-year students who took the ISAT.

MSES Standard 2

At least 85% of students enrolled in the fall who maintain an average daily attendance of at least 96% will obtain a score of 3 on the Idaho Reading Indicator (IRI) by the spring of their first year of enrollment.

Evaluation Instrument and Methodology

Instrument: Idaho Reading Indicator (IRI). Of the students who have been enrolled since the fall of any given year, the spring IRI scores of 3 will be counted and compared to the total number of students also having been enrolled since the fall who took the IRI.

C. Standardized Testing

Monticello, as required by law, complies with all testing requirements of the state. The data generated from these assessments is used by Monticello as a factor in determining the progress students are making towards meeting the Idaho Achievement Standards. This data is also used by the school to determine areas in need of improvement.

D. Accreditation

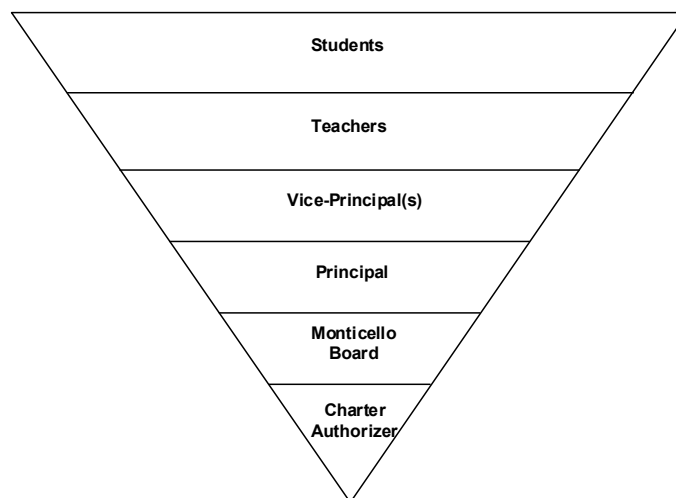
* American Montessori Society. *Essential elements of successful montessori schools in the public sector.*
<http://www.amshq.org/schoolExtras/publicEssentials.html>

Monticello will maintain membership with one or more of the professional Montessori organizations and may seek Montessori accreditation to assure consistent quality. In addition, the school will budget for continuing education through Montessori workshops and conferences. ~~Should the Board decide to In offering~~ a secondary education program ~~in the future~~, it the Board will seek accreditation through the Northwest ~~Association of Accredited Schools- Accreditation Association/AdvancEd~~ as provided by rule of the Idaho State Board of Education 5205 (3) (e) and 5210 (4) (b).

E. NCLB /School Improvement Plan

Should Monticello ever be identified as in need of improvement as outlined in the No Child Left Behind Act, the Every Student Succeeds Act, or by another federal or state decision, the school shall cooperate fully with State and Federal mandates to ensure compliance. It will be the responsibility of the principal to organize a team that includes the Principal, a teacher, a parent, and a board member to carefully review the areas indicated as in need of improvement. The team will make recommendations along with any budget proposals to the Board which will approve the final plan of action. Students and faculty will be monitored carefully throughout the year to ensure that progress is being made toward accomplishing the terms of the improvement plan.

07. Tab 5 Governance, Parental Involvement, and Annual Audit



MONTICELLO SERVANT LEADERSHIP MODEL

A. Governance

Monticello uses a Servant Leadership model as illustrated above. Directors, administrators and teachers all commit to use their influence and authority to support and serve each stakeholder that is above them, and ultimately the students enrolled at Monticello. This means continuously seeking to meet others' legitimate needs and improve the learning and working environment.

Monticello Montessori is a nonprofit corporation pursuant to Idaho law. The school is governed pursuant to the Bylaws adopted by the Incorporators and subsequently amended pursuant to the amendment process specified in the Bylaws.

The Board consists of at least three individuals who reside in Bonneville, Bingham, and Jefferson Counties or a contiguous county who are leaders in their communities across multiple sectors (public, private, non-profit) based upon their professional experience, service to their community, and/or honorary distinctions earned. The Board meets regularly to oversee the budget, management, operation, activities, and affairs of the school. The Board defines, composes, and revises (as needed) the policies of Monticello and ensures compliance with its charter agreement and applicable laws and regulations.

Monticello Directors do not receive compensation for their service as Board members, and may resign at any time by giving appropriate written notice. Directors may be removed, for cause, by an affirmative vote of two-thirds of the remaining members of the Board. Unless notice is waived by the director, any director facing possible removal must be provided with written notice of the intent to hold a vote on possible director removal seven (7) days prior to the date that the matter will be voted upon. The Board Chairperson will use revised Robert's Rules of Order. The Board will set its own threshold for minimum Board attendance policies as well as possible sanctions for repeated or habitual unexcused non-attendance.

The Monticello Board of Directors shall be considered the Board of Directors for purposes of the nonprofit corporation. The Board of Directors will elect the officers of the corporation and determine the duration of their term(s). The Board of Directors will govern in accordance with the Articles of Incorporation and the Bylaws of Monticello Montessori, Inc.

All meetings of the Board of Directors for Monticello are held in accordance with open meetings laws.

The Board, at its discretion, may vote to expand its membership and/or create subcommittees. Specific responsibilities of the Board are defined in the Bylaws.

This charter is a grant of authority approved by the Commission to the Board of Directors of Monticello Montessori pursuant to 33-502A(2), Idaho Code.

B. Parental Involvement

Parents provide feedback regarding the school's program each year through meetings and surveys. Experienced Monticello families serve as mentors to new families. Parents are actively encouraged to work with the school and parent organizations including:

- Board of Directors
- Community/Parent Teacher Advisory Board or other ad hoc committees
- Family informational sessions
- Student outings and field trips
- Student community service projects

*Monticello will implement the following recommendations from the American Montessori Society's "Essential Elements of Successful Montessori Schools in the Public Sector:"**

- Provide Montessori parent education programs that promote understanding of Montessori principles and curriculum.
- Develop an admission process that informs parents about the nature of Montessori and seeks the necessary commitment to the program.

C. Annual Audit

Monticello's annual budget shall be prepared in compliance with all statutes and rules of the State of Idaho applicable to charter schools. Copies of the Budget shall be provided to the Commission upon Board approval and delivery to the State Department of Education. All Accounting records shall be established and maintained in accordance with accounting principles generally accepted in the United States. In addition, Monticello shall follow all requirements and regulations as may be set forth from time to time by the State Board of Education and State Department of Education. Monticello operates through funding provided by the State of Idaho and the Federal government. Monticello will continue to seek out private grants and donations to supplement the school's funding. All invoices of Monticello are independently reviewed by a Board member prior to submission to the Board for approval. A detailed report as to the financial status of Monticello and its Budget, including a detailed cash distribution report, is provided at each monthly regular meeting of the Board.

An audit of the School's financial statements is performed annually by an independent Certified Public Accountant. The audit reports, accompanied by the related financial

* American Montessori Society. *Essential elements of successful montessori schools in the public sector.*
<http://www.amshq.org/schoolExtras/publicEssentials.html>

statements are submitted yearly to the Commission pursuant to the requirements of Section 33-701(6) & (7), Idaho Code.

Programmatic outcomes (Measurable Student Educational Standards) are composed of goals for student learning and other objectives described in this application as well as those requirements set forth by the Idaho Charter School Commission pursuant to Section 33-5205(3)(k), Idaho Code. Annually, the school shall report in detail its performance against these programmatic objectives, describe deficiencies in performance, and set forth corrective actions for remedying these deficiencies, submitted no later than October 15th for the previous school year. Additionally, the school shall comply with any other requirements that the state might specify at a later point.

08. Tab 6 Personnel

The staffing plans for Monticello will change each year depending upon the needs of the school.

A. Personnel Qualifications

Monticello meets or exceeds, at the discretion of the Governing Board, Idaho Code for statutory requirements for charter schools.

*Monticello will implement the following recommendations from the American Montessori Society's "Essential Elements of Successful Montessori Schools in the Public Sector:"**

- Employ Montessori teachers who have Montessori credentials or Project Based learning instructional training for the levels they teach.
- Maintain an active and open recruitment for Montessori credentialed teachers.
- Budget for future Montessori teacher education and Project Based Instruction training ~~for non-Montessori-credentialed teachers.~~
- Provide professional Montessori in-service by experienced credentialed Montessori educators.
- Contract for on-going internal and periodic external Montessori consultation and/or professional support as a follow up to Montessori teacher education.
- Employ one paraprofessional per elementary classroom, each having received Montessori orientation for that role.

* American Montessori Society. *Essential elements of successful Montessori schools in the public sector.*
<http://www.amshq.org/schoolExtras/publicEssentials.html>

B. Health and Safety

The school building, administrative offices, and other facilities will be in compliance with all required federal, state and local regulations required for public schools.

Parents are expected to demonstrate that their children obtain proper immunizations upon admission according to Idaho Statutes (39-4801). Parents who object to having their children immunized may sign an exemption form. Immunization forms and other pertinent medical records are kept (confidentially) by the school administration.

Monticello will conduct criminal history checks for all employees in compliance with Idaho Code 33-130.

Monticello will utilize the Bonneville Joint School District No. 93 Emergency Operations Plan/Crisis response Plan.

Additional policies and procedures are implemented by the Board, as needed.

C. Employee Benefits

All staff members of the Charter School are covered by the public employee retirement system (PERSI), federal social security, unemployment insurance, and worker's compensations insurance. Monticello Montessori Charter School will ensure that all eligible staff members are covered by health insurance.

D. Transfer Rights

Employees of Monticello are not employees of Bonneville Joint School District No. 93. Teachers at Monticello will not be eligible for an in-district transfer to another school in District No. 93.

E. Collective Bargaining

The staff of the Charter School shall be considered a separate unit for the purposes of collective bargaining.

F. Written Contract

All teachers and administrators shall be on written contract as required by Section 33-5206(4), Idaho Code.

09. Tab 7 Students

A. Admission Procedures and Over-Enrollment Provision

Monticello is nonsectarian in its programs, admission policies, employment practices, and all other operations. As a public charter school we do not charge tuition for services that are reimbursed by the state. A tuition fee will apply for students enrolled in preschool and full-day kindergarten programs not supported by state funds (if they are offered). Monticello does not discriminate against any applicant for admission on the basis of ethnicity, national origin, gender, disability, religion, intellectual or athletic ability, or proficiency in the English language.

Enrollment and Over-Enrollment Provision

Enrollment will be reviewed and determined annually. ~~, with an enrollment cap of 192 in the first year of operation, 288 in the second year, and 320 in the third year.~~ Registration applications for new students will be accepted during open enrollment (January through mid-April each year). Enrollment will be limited to 32 students per class in the elementary classes, and 25 students per class in middle school classes. In the event that projected enrollment demands exceed curriculum level capacity for the next school term, a Monticello's lottery process will be implemented to fairly allocate class vacancies. Consistent with the Montessori model, should preschool ever become state-funded, Monticello may enroll preschool students as part of its Primary public school program using the same lottery process.

In accordance with Subsection 203.06 and 203.07 of the Administrative Rules Governing Charter Schools, five preference pools/lists will be established and prioritized as follows: 1) pupils returning to Monticello in the second or ~~any consecutively~~ subsequent year of operation; 2) children of founders and full-time employees, provided that this admission preference shall be limited to not more than ten percent (10%) of the initial capacity of the public charter school; 3) siblings of pupils already selected by the lottery or other random method, or who are already enrolled in the school; 4) prospective students residing in the attendance area of the public charter school; and 5) an equitable selection process, such as by lottery or other random method for all other students. Applications will be drawn for placement using the Equitable Selection Process outlined in Subsection 203.09 of the Administrative Rules Governing Charter Schools. Those on the final selection lists may be placed in the school any time during the year when an opening occurs. Available positions will be filled from the waiting lists established from the initial lottery.

Once on the final selection list, students will remain eligible for placement within the school without repeating the application process. Each year, Monticello will contact all students on the final selection list and request written verification of the continued desire to be on the list. Students wishing to be removed from the final selection list must make their request directly to Monticello Montessori in writing. Once the enrollment period is complete and final selection lists have been established through lottery as described above, subsequent applications will be added to the final selection lists on a first come, first served basis.

Re-enrollment forms shall be presented to each registered student in the spring of the current school year. Those discontinuing their studies shall not have a reserved position in the next curriculum level. The forms for re-enrollment must be signed and returned in compliance with the process and procedure that has been established by the school's administration, with consideration and approval by the Board. Failure to respond in the time provided shall constitute a waiver of any interest in application or enrollment renewal for the following term.

In accordance with Subsection 203.08 of the Administrative Rules Governing Charter Schools, Monticello shall maintain a proposed attendance list containing the names of all prospective students on whose behalf a request for admission was timely received by the public charter school, however the list will not be separated by grade level. In addition, the proposed attendance list shall contain columns next to the name of each student, in which the public charter school will designate admission preferences applicable to each prospective student. The columns shall be designated "A" for returning student preference; "B" for founders preference; "C" for sibling preference, with a corresponding cross-reference to each of the siblings of the prospective student; and "D" for attendance area preference.

Lottery

Monticello will hold a lottery on or before April 30 of each year to establish the waiting list order of entrance for the upcoming school year. All openings during the school year will be filled according to the order established by that lottery. The lottery will be held in a public forum and a disinterested party will conduct the lottery selection. Over-enrollment procedures will be conducted according to the requirements as set out in 33-5205, Idaho Code, as well as any rule adopted by the State Board of Education or State Charter Commission that is applicable to student lotteries held by public charter schools, and according to the process described under "Exceptions Approved by Commission Staff." Final selection lists for a given school year shall not roll over to a subsequent school year and will be developed using the Equitable Selection Process outlined in Subsection 203.09 of the Administrative Rules Governing Charter Schools.

Exceptions Approved by Commission Staff

Monticello Montessori uses a methodology that does not rank students by grade level. Instead, students progress from concept to concept and skill to skill regardless of age. There is nothing that prevents an older student from returning to an earlier lesson or classroom. Similarly, a younger student might take interest in a more "advanced" concept that older students are working on. Therefore, the IDAPA Rules referencing "grade levels" in Section 203, Admission Procedures, do not make sense for this charter school. Admission Procedures will be followed in every other detail as follows:

- All 192 open seats will be randomly selected as though they are a single grade in Year 1 for students between the ages of 5 and 9.
- 1 application per family with all siblings listed who are interested in enrolling will be returned to Monticello
- 1 family index card will be made with all siblings listed who are interested in enrolling
- All Founder cards will be pulled and labeled with a "B." (If the number of Founder children exceeds 10%, the cards will be selected randomly)
- The other cards will be placed in a box and pulled randomly
- Each individual child on the family index card will be numbered sequentially and labeled with a "C"
- Cards will continue to be pulled until all ~~192~~ open seats have been randomly selected
- Identifying all siblings on a single family card makes the lottery process more efficient by eliminating the redundancy of searching for siblings in a stack of ~~192~~ cards. This process is also more equitable since families with large numbers of children have an equal chance of their card being pulled as a family with only one child.
- In subsequent years Monticello will follow this same process with new openings and a potentially broader age range.

B. Student Disciplinary Procedures

Monticello as a public school adheres to all federal, state laws and regulations as well as school approved policies and procedures relating to student discipline and the required reports and actions for disciplinary infractions by its students. Monticello complies with all requirements of due process for student disciplinary violations including provisions for notice, fair procedures and a fair hearing in compliance with I.C. 33-205.

Administrative disciplinary actions may include, but are not necessarily limited to the following consequences:

- Student conference with principal and/or teacher
- Group conference that may involve student, parent, teacher, and principal

- Loss of school privileges
- Suspension / recommendation for expulsion
- Counseling

A student who is accused of misbehavior or a breach of the Code of Student Conduct will be presented to the principal or designee by the person having knowledge of the misbehavior or breach of conduct. The following protocol will be used to provide due process, provisions for notice, fair procedures, and a fair hearing before administering disciplinary action:

1. **Written Referral:** Violations shall be presented in written form and should be specific, indicating the breach of the Code of Student Conduct for which the referral is being issued.
2. **Student Notification:** The student will be placed on notice of the violation by the principal or designee and afforded an opportunity to explain.
3. **Initial Conference:** An initial conference (in person or by tele-conference) shall be conducted by the principal or designee at each level of discipline.
 - a. **Charges and Evidence:** The principal or designee shall confer with the student, explain the charges and evidence against the student, and allow the student an opportunity to present his or her side of the story prior to taking disciplinary action.
 - b. **Parental Assistance:** A good faith effort shall be made by the principal or designee to employ parental assistance or other alternative measures prior to suspension, except in the case of emergency or disruptive conditions that require immediate suspension or in the case of a serious breach of conduct.
4. **Parental Notification:**
 - a. **By Telephone or E-mail:** The principal or designee shall make a good faith effort to notify the parent by telephone or e-mail of the student's misconduct and the proposed disciplinary action.
 - b. **By Written Notice:** Regardless of whether there has been communication with the student's parent by telephone, the principal or designee shall, within twenty-four (24) hours of taking disciplinary action, send written notice to the parent describing the disciplinary action imposed and the reason the action was taken.

Violations Leading to Suspension

The following violations will lead to short-term suspension (not to exceed 5 school days) or other low-level disciplinary action, following the appropriate due-process procedures. Upon appeal to the Board of Directors the suspension may be extended for up to twenty (20) days. This appeal would only be granted if there was a finding by the Board that

immediate return to school attendance by the temporarily suspended student would be detrimental to other students' health, safety, or welfare. Multiple violations at this level may lead to expulsion.

Abusive language or conduct: A student who uses or engages in abusive, profane, obscene or vulgar language, or conduct, in the presence of another person, whether in person or electronically (i.e. online), is guilty of unacceptable conduct.

Bullying, physical and/or emotional harassment: A student who engages in verbal and/or physical behaviors that intimidate others, or who attempts to obtain something such as money or information from somebody by using force, threats, or other unacceptable methods is guilty of unacceptable conduct.

Cheating: A student who participates in using, copying, or providing another student with any test answers, answer keys, or another person's work, representing it to be their own work, is guilty of unacceptable conduct.

Disruptive behavior and/or minor infractions: A student who engages in unacceptable behavior or conduct that is disruptive to the educational process, but is not considered a serious breach of conduct, or who violates school rules and policies determined by the principal to be minor in nature, is guilty of unacceptable conduct.

Unauthorized access: A student who enters part of the school website that has been denied to them by administrators will be in violation of the school's Technology Use Policy.

False information: A student who knowingly and intentionally reports or gives false or misleading information, either oral or written, which may injure another person's character or reputation or disrupt the orderly process of the school is guilty of a serious breach of conduct.

Interference with the educational process: A student who is guilty of willful disobedience, open defiance of authority of the principal or any member of the school staff, violence against persons or property, or any other act that substantially disrupts the orderly conduct of the school is guilty of a serious breach of conduct.

Vandalism: A student who intentionally destroys damages or defaces records or property (whether physical or electronic) owned by or in the possession of the Board or other members of the school staff, is guilty of a serious breach of conduct.

Theft: A student who takes from another person money or other property (whether physical or electronic) belonging to the other person with the intent to permanently deprive the victim of such property is guilty of a serious breach of conduct that may be reported to the proper law enforcement agency.

Robbery: A student who takes money or other property (whether physical or electronic) belonging to another person from another person by the use of force, violence, assault, or threatened use of force or violence is guilty of a serious breach of conduct that may be reported to the proper law enforcement agency.

Sexual Harassment: A student who subjects another person to unwelcome sexual advances, verbal harassment or abuse, pressure for sexual activity, repeated remarks with sexual or demeaning implications, unwelcome or inappropriate touching, or suggestions or demands for sexual involvement accompanied by implied or explicit threats – either in person or on-line – is guilty of a serious breach of conduct. This also includes transmission of sexually inappropriate or explicit material.

Indecent exposure or conduct: A student who exposes or exhibits his or her sexual organs in the presence of others in a lewd or indecent manner, or who intentionally and willingly engages in behavior that is considered lewd, indecent or obscene, either in person or on-line, is guilty of a serious breach of conduct that may be reported to the proper law enforcement agency.

Burglary: A student who enters or remains in a building or property owned or maintained by the Board with the intent to commit theft, vandalism, or some other criminal offense therein, is guilty of burglary unless the premises at the time is open to the public or the student is legally authorized to enter or remain. However, the fact that the premises may be open to the public or that the student may be authorized to enter or remain will not excuse any other offense, violation or other breach of conduct committed by that student while therein. Burglary is a serious breach of conduct that may be reported to the proper law enforcement agency.

Abusive language or conduct directed at a school employee or trustee: A student who uses or engages in abusive, profane, obscene, or other vulgar language or conduct directed at a school employee or trustee is guilty of a serious breach of conduct.

Truancy: A student who is truant from school is guilty of a serious breach of conduct.

Violations Leading to Expulsion

The following violations will lead to expulsion, following the appropriate due process procedures. Only the Appeals Board consisting of the principal and the Board of Directors may expel a student.

Weapons: A student who displays or is in possession of an object normally considered a weapon (other than a firearm), such as a knife or club, while attending a school-sponsored activity away from home is guilty of a serious breach of conduct.

Firearms: A firearm is any weapon (including a starter gun, pellet gun, B-B gun, air rifle, or air pistol) that will, or is designed to, or may readily be converted to expel a projectile by the action of an explosive or compressed or forced air. It is the expressed policy of the Board that, with the exception of law enforcement officers, no person shall have in his or her possession any firearm of any nature, including a firearm used for recreational activities, while on a school campus, or other property owned or maintained by the Board, or property designated for school activities.

Battery: A student who intentionally strikes another person against the will of the other person is guilty of a serious breach of conduct that may be reported to the proper law enforcement agency.

Bomb and explosive: A student who is in possession of a bomb, explosive device, or substance or materials intended for use in a bomb or explosive device or substance while at a school-sponsored activity, on Board property, or a chartered bus (unless the material or device is being used as part of a legitimate school-related activity or science project conducted under the supervision of an instructor with the knowledge and consent of the principal) is guilty of a serious breach of conduct.

Arson: A student who willfully, by fire or explosion, damages or attempts to damage any building, structure, vehicle or other property owned or maintained by the Board is guilty of a serious breach of conduct that may be reported to the proper law enforcement agency.

Threat: A student who intentionally threatens, by words or act, to strike or cause bodily harm to another person, has the apparent ability to carry out such threat, and causes the other person to have a well-founded fear that he or she is about to be struck or about to suffer such bodily harm is guilty of a serious breach of conduct that may be reported to the proper law enforcement agency.

Internet Use: Any student who abuses the Acceptable Use Policy shall be dealt with according to the parameters of the use policy.

Truancy: A student who is habitually truant from school is guilty of a serious breach of conduct.

Alcohol, drugs or drug paraphernalia: A student who possesses or attempts to distribute alcohol, drugs or drug paraphernalia during school-related events or on school site will be in serious breach of Monticello conduct.

Disciplinary Procedures for Students with Disabilities

Misconduct will be addressed through normal school wide discipline policies, instructional services, and/or related services. If a student with disabilities has behavior problems that interfere with his or her learning or the learning of others, an

individualized education program (IEP) team shall consider the use of strategies, including positive behavioral supports and interventions, to address the behavior. If the IEP team determines that such services are needed, they be included in the IEP and be implemented. Students with disabilities who are subject to disciplinary actions will receive all of the due process rights afforded students without disabilities under Idaho Code 33-205. In addition to these rights, students with disabilities who are being removed from their current educational placement will receive all special education rights and additional discipline procedures mandated for charter schools by the Individuals with Disabilities Education Improvement Act of 2004 (IDEA 2004). These procedures apply when Monticello is unable to work out an appropriate placement for the student with the parent and/or adult student. Further, these procedures do not prevent Monticello personnel from maintaining a safe environment conducive to learning that is critical for all students. Even though Idaho Code allows the Board of Directors to “temporarily suspend” students for up to 20 school days, all students with disabilities who have been suspended or expelled for more than 10 cumulative school days in a school year retain the right to a free appropriate public education (FAPE).

C. *Students under the Influence of Alcohol or Controlled Substances*

Monticello shall follow the procedures required by Section 33-210, Idaho Code, for students found using or under the influence of alcohol or controlled substances.

D. *Public School Attendance Alternative*

Students residing within the attendance area who choose not to attend the public charter school will have the same attendance alternative as other students in District No. 93. No student will be required to attend Monticello per Section 33-5205 (3) (n).

E. *Publicity of Enrollment Opportunities*

Monticello’s educational program will actively seek students from its attendance area. Monticello prepares and mails out informational materials regarding its school program. Further, Monticello holds informational sessions to promote the school program. The School maintains a website addressing the educational program, and enrollment opportunities.

In accordance with IDAPA 08.02.04.203.02, Monticello shall ensure that dissemination of enrollment information takes into consideration the language demographics of the attendance area and occurs at least three (3) months in advance of the enrollment deadline. Advertisements and other informational materials shall be posted in highly visible and prominent locations and shall include at least three (3) press releases or public service announcements to media outlets.

F. Denial of School Attendance

Pursuant to Section 33-5205(3)(i), Idaho Code a student cannot be suspended or expelled and thereby deprived of a free education provided in the public schools without due process. Due process requirements guarantee all students the right to fair notice, fair procedures, and a fair hearing. The student and his or her parent or guardians have the responsibility to follow the procedures set forth herein in a respectful and timely fashion. Monticello Policy addresses the school's plan for denial of attendance to any student who is or has been:

- Habitually truant
- Incurable
- Deemed by the board of trustees to be disruptive of school discipline or instructional effectiveness
- Detrimental to the health and safety of the other students, or e. Expelled from any other district

G. Student Handbook

Monticello shall provide to each child enrolled a Student Handbook that outlines the Code of Conduct. The Student Handbook is reviewed in each classroom at the beginning of the school year by the principal. Parents will provide their signature acknowledging their understanding of, and willingness to comply with, the rules set forth in the Student Handbook. A draft handbook can be found in Appendix D.

10. Tab 8 Business Plan, Budget, Transportation and Food Services

A. Business Plan

i. Business Description:

Monticello is a public Montessori charter school created under the laws of the State of Idaho. This charter program is seeking approval by the Idaho Public Charter School Commission.

Monticello provides residents of Bonneville, Bingham and Jefferson Counties a public Montessori option to the traditional school setting. The mission of Monticello is to help students maximize their inner potentials and experience purpose and meaning in life by providing a high-quality, mastery-based Montessori education. A research-based curriculum is used to prepare Idaho

students to meet the educational goals of the school and the state of Idaho as outlined in the Idaho State Content Standards.

The Monticello curriculum is based on the Montessori Method. The Montessori Method is a unique approach to learning that meets the needs of children with special needs, the gifted and talented, and everyone in between in an inclusive, highly supportive environment. Monticello utilizes an innovative approach to student advancement that will continue to support inclusiveness and address the specific needs of every child. Monticello teachers utilize a variety of best-practices to meet the needs of their students. The school's current focus is on offering a high-quality lower-elementary Montessori option for families (Kindergarten through age 9). The school may expand in phases to include older students with an "arts and classics" emphasis as the need becomes apparent and the school is fiscally able to do so. Monticello may offer a full-day preschool and kindergarten to better meet the needs of parents. The curriculum is aligned with the Idaho State Standards and Idaho-certified teachers oversee the learning of each child in their class by reviewing student work for quality, accuracy, and understanding, and by communicating directly with the student and family on a regular basis. Teachers are available during school hours when students (or adults) have questions.

Students with many different needs can benefit from the Montessori Method. The school is an attractive option for average, self-motivated students who desire the flexibility to learn at their own pace in a structured learning environment. Gifted and Talented students are drawn to the differentiated, constructivist nature of the program. Students with disabilities such as developmental delays and/or sensory integration dysfunction, cognitive impairment, autism, and other learning disabilities benefit from the inclusive environment and highly sensory learning approach.

The school's main administrative office is headquartered in the school facility in ~~Idaho Falls~~ Ammon, Idaho. Administrators, teachers and other faculty work at the school facility. The school's attendance area is Bonneville, Bingham and Jefferson Counties. All of these counties are contiguous, and considering the region's population growth trend from INL expansion and the shortage of charter school options available to residents of these counties, the attendance area is compacted. ~~There are currently two charter schools in District 93, both of which have sustained high enrollment numbers and waiting lists since their inception. There are no charter schools in Idaho Falls School District 91, nor in Jefferson nor Bingham Counties. According to the Idaho Charter School Network 2007-2008 data regarding waiting lists there is a growing interest in charter schools in Bonneville County. Most children on these waiting lists are in the lower grades, which is the target market for Monticello. White Pine Charter School (Core Knowledge) currently has 200 children on waiting lists while Taylor's Crossing Public Charter School (Harbor) has 320.~~

Enrollment in charter schools in Bonneville County continues to increase ~~as well~~. White Pine opened with 185 students in 2003 and ~~now in 2010 serves~~ 360. Taylor's Crossing opened with 272 students in 2006 and ~~now in 2010 serves~~ 305. Since Monticello's founding, two additional charter schools have also successfully opened in the area. This indicates that parents continue to look for school-choice options. Monticello's plan for middle school curriculum that is not book and seat-based, but is instead truly high-quality project-based, is unique among all middle schools in the attendance area. Parents, teachers and the board believe that this approach will greatly appeal to parents and students in the school's service region, and will fill the need parents of Monticello's middle school committee have articulated for a nontraditional middle school concept that continues applying Montessori educational methods in a high-quality, problem-based, cross-curricular approach to learning.

According to data at the Idaho Department of Labor, Bonneville County has experienced steady growth since 1997 with an average increase in population of over 2300 per year. Most of that growth has impacted District No. 93, the area which Monticello intends to serve. Another Charter school should relieve some of the impact of the population growth this area has seen.

For the 2010-2011 school year Monticello will serve students between the ages of 5 and 9. Class size will be capped at 32 students. At the discretion of the Board, Monticello will seek to add older students each successive school year through age 12-14. ~~For each successive school year, enrollment may increase by 32-96 students depending upon student enrollment figures.~~

ii. Marketing Plan:

Monticello's marketing plan will be a grassroots effort. A Facebook group has been created to begin generating discussion and interest in the preparations toward opening its doors to students in the fall of 2010. Public information sessions will be advertised via radio, the Internet, and posters to be held in the summer of 2009 and throughout the fall of 2009. An official web-domain for the school will be originally purchased and a website established to answer questions and provide information for the community. The Board will open student enrollments beginning in January 2010 with a cut off of March 31.

In 2017-2018 the school undertook updating its website to improve presentation and communication. The fluent use of a Facebook page continues to support the school's public presence. In planning for expanding the school's program to provide a middle school, Monticello has announced its grade level expansion intentions as contingent upon PCSC approval both in social media and the school website, and has been contacted by a core of 7th and 8th graders' parents who are interested in enrollment for their child.

iii. Management Plan:

Monticello is a public charter school managed by a non-profit corporation under the Idaho Nonprofit Corporation Act and the Idaho Charter Schools Act. The Board of Directors control and govern the operations of the school and is comprised of individuals from Bonneville County and other contiguous counties. The Board conducts regular, special and annual meetings in compliance with provisions of the Idaho Code. The Board is responsible for the selection and adoption of the educational program of the school, as well as the approval/disapproval of recommendations brought to the Board for personnel, programs, policies, and procedures of the school. Monticello's Board follows all provisions of the Open Meetings Law of the State of Idaho and maintains minutes of all Board meetings; these minutes are available for public inspection and/or copying, as are all other documents encompassed under the public records laws of the State of Idaho.

iv. ~~Resumes of the Directors of the Non-profit Corporation:~~

~~Resumes and references of the Directors are provided in Appendix C of the Charter Petition.~~

Current Charter District Directors

Michael O'Bleness
Ken Glodo
Janece Moore
Dan Thurman
Anthony Kinikin

~~Below are brief bios of the~~ Founding Charter Directors:

David Meyer, Ph.D **President:** ~~The Monticello Montessori Charter was conceived in the belief that every child deserves the best education possible. One of the charter developers, David Meyer, adopted twins who later manifested developmental delays and sensory integration dysfunction. The Montessori Method was ideal for them. David, a professional educator himself, was fascinated with how the program helped his children catch up academically and gain greater independence and confidence. He was thrilled with their progress, and fully committed to the methodology, however the financial sacrifice to send them to a private Montessori program was tremendous. The approval of this charter proposal makes a free Montessori education available to all children in the Idaho Falls area. David holds a Masters Degree in Education, a current Idaho Principal's Certificate, and current Idaho Elementary / Secondary Teaching~~

Certificates. He is interested in continuing to lead the charter school in the capacity of administrator.

Liz Killpack, **Vice-President**, graduated from Utah State University in 1996 with a degree in Parks and Recreation Management. After graduation she and her husband moved to Eastern Idaho where she received her second bachelor's degree from Idaho State University in Secondary Education, with a major in English and a minor in History. She taught in Idaho Falls District #91, Firth District #59, and Shelley District #60. After starting a family and taking some time off from teaching, Liz was appointed and then re-elected to the Firth School Board of Trustees. There she served as the Vice Chair, as well as on the Curriculum Committee, Negotiations Committee, and the Para-Professionals Task Force. During her service she was elected to represent the entire region as the Vice Chair on the ISBA Executive Board. Due to the effects of West Nile Virus Liz resigned from both the Firth Board and the ISBA board to regain her health. Liz is currently employed by the Idaho School Board Association as their Board Development Coordinator and Trainer. Her employment entails traveling the state of Idaho training boards to be effective, to implement strategic plans, to set goals, to govern and conduct superintendent evaluations, to oversee the budget, and to improve student achievement. She and her husband, Todd, have 5 children and reside in Firth, Idaho.

Dr. Andrew Meyer, E.D., **Treasurer**, is an Assistant Professor at Idaho State University. He retired from administration after a long and distinguished career as a school principal and superintendent. Dr. Meyer is certified to teach K-12 and as an Administrator K-14 in both California and Idaho. He is noted for his leadership in creating National Blue Ribbon Schools and California Distinguished Schools. In 1998 and again in 2003 he was recognized by the Association of California School Administrators (ACSA) Region 10 as Superintendent of the Year. He has conducted training in collective bargaining with a specialty in Interest Based Bargaining which he instituted in his own district. Dr. Meyer has been recognized and honored by the California State Assembly, the California State Senate, the United States Congress, as well as by every school district and city in which he has served. He was a pioneer in the development of the largest charter school network in California, providing unparalleled academic alternatives for parents and their children. His interest in the Monticello Charter is to serve in an advisory capacity and work to create a partnership between Monticello and Idaho State University.

Lori Gentillon, **Secretary**, is a native Idahoan and received her Bachelor's Degree in Psychology from Idaho State University. She has been employed at a community rehabilitation service provider for the past thirty years and is currently responsible for oversight of all rehabilitation services offered by the organization. This includes four locations covering southeastern Idaho. In addition to her paid employment experience, she has served 12 years on School District #59 Board of Trustees; several as Board Chair as well as Treasurer. She is currently

~~serving on the Board of Directors for Committed Hearts which supports the Cardiac Rehabilitation Unit at Eastern Idaho Regional Medical Center. She is also Treasurer for ACCSES Idaho, a State Association for Not for Profit Community Rehabilitation Providers. She co-owns a farm with her husband and has three children who have all graduated from public high school and attended State Universities.~~

v. Financial Plan:

Basic funding for the school is provided as available under the Idaho Code as well as through federal funding programs. Monticello also seeks funding to support educational programs from private entities, individuals and governmental programs.

The Monticello Board approves a balanced budget prior to the beginning of each fiscal year. Budgetary and financial documentation is provided on an annual basis.

vi. Start Up Budget with Assumptions

See Appendix E

vii. Three (3)-Year Operating Budget Form

See Appendix F

viii. First Year Month-by-Month Cash Flow Form

See Appendix G

B. IFARMS (Idaho Financial Accounting Reporting Management System)

Monticello's budget will be in the Idaho Financial Accounting Reporting Management System (IFARMS) format.

C. Transportation Services

The board may contract with a transportation provider to transport any pupil when in its judgment the age or health or safety of the pupil warrants. The board may also contract with a transportation provider to fulfill any transportation requirement necessitated by a student's IEP. Transportation is generally not provided to students who live outside of the attendance area (Bonnevile, Jefferson and Bingham Counties), nor to students who reside outside of the reimbursable limitation established by I.C. 33-5208(4). Any transportation the board chooses to provide for ineligible students, as defined by I.C. 33-5208(4), shall be on a "space available" basis and neither time, mileage, nor other appreciable cost, shall be added as a result of this service. The board reserves the right to expand or contract transportation services pursuant to any changes made to I.C. 33-5208(4). The board also reserves the right to eliminate transportation services altogether if ridership falls below numbers sufficient to support the service, or if the Idaho Legislature or the Congress fails, neglects, or refuses to appropriate adequate funds for transportation services.

D. Food Services

Monticello offers a school lunch program. Healthy, whole food sack lunch menu items are to be made available to students at a reduced cost who qualify for free and reduced food services. One full-time classified staff position has as part of his or her responsibilities the organizing of lunch menus and coordinating of the daily lunch routine. He or she may be assisted on a rotating basis by classroom aides and student volunteers. As the school grows and the demands for lunch increase, personnel will be hired accordingly. Kitchen facilities sufficient to support the school's food services plan have been contemplated as part of the school's building plan. Free and reduced lunch forms are provided to all students by Monticello. A nominal fee applies for students and others who wish to purchase food. Microwaves are made available for students who need to reheat food items. Hot lunches will generally not be provided. Monticello uses verification, reporting, and record keeping procedures as outlined in the National School Lunch Program through the State Department of Education.

11. Tab 9 Not a Virtual Charter School

Monticello Montessori is not a virtual charter school as defined by Section 33-5202A(6), Idaho Code.

12. Tab 10 Partnerships, Additional Information, and Dissolution Plan

A. Partnerships

At the discretion of the Board, Monticello contracts with public and private entities for food services, transportation services, curriculum and materials, technology services, and other services deemed necessary. Agreements are amended from time to time, as needed. Copies of contracts and/or lease agreements are ~~included in Appendix I~~ posted to the district website.

B. Additional Information

Any statistical reports that are filed by Monticello with the State Department of Education shall also be filed with the Commission. Such Commission filing shall coincide with the timing of filings with the State Department.

C. Dissolution Plan

Monticello will fully cooperate with the Commission in the event of dissolution of the charter. In such cases, the Governing Board of Monticello is responsible for the dissolution of the business affairs of the school. Upon dissolution of Monticello remaining assets will be distributed to creditors pursuant to Sections 30-3-114 and 30-3-115 of the Idaho Code. All remaining assets will be distributed to the Idaho Public Charter School Commission. All records of students residing in District No. 93 will be immediately transferred to the District. All parents of students will receive written notice of how to request a transfer of student records to a specific school. Monticello will accommodate student record requests from schools outside of Bonneville School District for up to one year after dissolution.

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Supplemental Information

A. Supporting Documentation, Financial

- Please see attached:
 - 1) 2M 2018 April Budget Report
 - 2) FY19 Salary Based Apportionment MMCS K-8
 - 3) Estimating State MO Revenue FY19 MMCS
 - 4) Charter Support Unit Calculation Best28Without MMCS FY19 K-8
 - 5) Charter Support Unit Calculation CYWithout MMCS FY19 K-8
 - 6) 3rd Quarter Budget Summary Report

These documents show that Monticello, in spite of a dip in enrollment following the Public Charter School Commission's rejection of its 2016 middle school expansion proposal has remained financially stable without reducing staff or compromising its core values, and has in fact increased its operations reserve.

The supporting documents FY19 Salary Based Apportionment MMCS K-8, Estimating State MO Revenue FY19 MMCS, Charter Support Unit Calculation Best28Without MMCS FY19 K-8, and Charter Support Unit Calculation CYWithout MMCS FY19 K-8 provide supporting documentation of FY19 budget planning details given in Appendix A-Template-Charter-Petition-Budget-Template. This Template provides planning details and precisely derived estimations of cash flow for the next year and in the Operational Budgets tab, revenue and expenses estimates for the next three years with assumptions and explanations. Noteworthy are the Net Income (Loss) figures (Line 29 in the Financial Summary Tab), which show an increasing positive balance each year.

Please note that the district has cash on hand of 121, 360 as operations reserve. That amount has been entered into the Cash Flow tab as Revenue, and carried forward under Cash Flow Cash on Hand (Line 30). The District added this data to the existing sheet, but did not attempt to make this change appear in the Financial Summary Tab, which is highly formulated and thus easily corrupted.

Altogether these documents show that Monticello's financial position is stable and that the district can well support the proposed expansion.

B. Supporting Documentation, Market

1. Marketing Efforts: In addition to grassroots, word-of-mouth advertising and social media presence, the school has at various times used signage, radio ads, press releases, boosted social media, and TV public announcement footage to raise public awareness of the school. The district has also designated a supplemental position, Marketing Coordinator, to manage school promotion, which has produced consistent high quality press releases regarding school events to boost public awareness.

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2. Please see attached Growth and Development Forecast Bonneville School District 93 April 18, 2018, a study presented by Rockwell Homes on behalf of Bonneville County's local subdivision developers to the Bonneville Joint School District Board of Trustees. All homes in the document have been presold and child estimates are based on an average 2.5 children per household. This study shows that within the next year population and housing increases will cause an increase within District 93 boundaries of 6488 children.
(<https://v3.boardbook.org/Public/PublicAgenda.aspx?ak=1000818&mk=50242001> accessed 5-10-18)

Monticello is located within the boundaries of Bonneville Joint School District No. 93. In its March bond election District 93 passed, on the first attempt and by supermajority, a bond for a new 1000 student middle school to open in summer 2021. This confirms that local public opinion strongly agrees with the need for middle schools in Monticello's attendance area. According to District 93 studies and administration, that trend is not changing. Dr. Charles Shackett, District 93 Superintendent, stated that "Bonneville Joint School District, which is one of the fastest-growing districts in what according to the U.S. Census is the fastest-growing state in the country, is going to have to keep building new schools as more people move in."
(<http://www.postregister.com/articles/news-daily-email-todays-headlines/2018/02/28/district-93-makes-bond-pitch-public-meeting> accessed 5-10-18)

Monticello administration is well aware of the crowded conditions in many District 93 schools. Portable structures are providing much needed extra classroom space in many if not most of these schools with no plans to reduce the number of portables District 93 uses. It appears that this community will be continuing to grow, and has a serious need for middle school facilities. Monticello's proposal is timely to fill a small portion of that need.

C. Supporting Documentation, Capacity

Below three categories of Capacity for Monticello Montessori Charter School are explained in greater detail:

1) Physical Facility Capacity

- Please see attached Rental Quote 5-7-18, Pacific Mobile Structures

Monticello has had a known need for ancillary space for some time. That need is now being addressed by the addition of modular buildings to campus facilities during summer 2018. These modular buildings will provide both classrooms and small meeting rooms/offices. The district currently plans to rent/lease the needed modular buildings and is in the process of examining proposals from several suppliers. The attached rental quote on the 28'x64' structures is currently considered the best proposal, though the district is still open to other offers as mobile education buildings become available in the next few weeks. The cost of two

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28'x64' rented modular structures is included in the calculations in the attached Appendix A-Template-Charter Petition-Template at Operational Budget Lines 125 and 126. These additional facilities will address the school's physical capacity need for added classrooms and ancillary space.

Monticello will begin its middle school program small, with one middle school class and one additional teacher the first year. An additional class and teacher are to be added the following year.

Monticello has two special education teaching assistants and one full time special education teacher already in place. No anticipated increase in special needs staffing is anticipated at this time. Also, the district does not anticipate adding to present contracted service provider agreements. Middle school students who receive contracted special needs services will be included within the scope of existing counseling, speech therapy and occupational therapy provider contracts.

2) Instructional Capacity

- Please see attached MMCS 2016-2017 ScoreCard

The district aims for all teachers to have both State of Idaho and Montessori or Project Based Learning certifications. Five of Monticello's nine teachers hold Montessori certification while one is also certified in Project Based Learning. With the exception of special education, only the two newest classroom teachers currently lack a dual certification. Monticello realizes that asking teachers to be dually certified is a much higher standard of pedagogical mastery than other Idaho teachers possess. It is an indication of the high quality teachers the school employs and the district's dedication to its key design elements. Additionally, Idaho State Department of Education data, given in the Professional Qualifications table below, shows that fully one third of Monticello teachers held master's degrees in addition to four fifths holding additional certification in 2014-15. Current data in 2017-2018 remains similar, with one third of teachers holding master's degrees or the equivalent advanced credits and two thirds possessing additional certification.

Monticello Teacher Professional Qualifications 2015

Professional Qualifications of Public Elementary and Secondary School Teachers						
BA Degree	BA + 12 Credits	BA + 24 Credits	MA Degree	MA + 12 Credits	MA + 24 Credits	PhD Degree or MA + 36 credits
6.00	1.00	0.00	1.00	0.00	2.00	1.00

(Source: <https://apps.sde.idaho.gov/ReportCard/SchoolYear/22>)

The Board realizes that dually-certified teachers are difficult to find. Therefore, the district dedicates part of its state and federal professional development funds to provide high quality

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Montessori training. In expanding grade levels to K-8, the district plans to dedicate funds to Project Based Learning training for middle school teachers, thus aligning with district continuous improvement plans and targeting student achievement improvement

Monticello has a shown an overall trend of improvement in student achievement. Students new to the district often perform below proficiency, but usually improve their ISAT assessment scores over time. Recent Science ISAT scores show that Monticello's 5th graders have repeatedly performed well above the state average.

Comparison of Statewide to School Average ISAT % Prof-Advanced

	2014-2015			2015-2016			2016-2017		
	%Adv	% Prof	%Prof+ %Adv	%Adv	% Prof	%Prof+ %Adv	%Adv	% Prof	%Prof+ %Adv
State of Idaho ELA All Students	17.9%	33.2%	51.1%	19.4%	33.5%	52.9%	19%	33.0%	52.0%
Monticello ELA All Students	23.7%	27.8%	51.0% (-0.1%)	11.0%	33.0%	44.0% (-8.9%)	15.9%	39.8%	55.7% (+3.7%)
State of Idaho Math All Students	15.2 %	24.1 %	39.3%	17.3 %	24.4 %	41.7%	18.1 %	23.7 %	41.8%
Monticello Math All Students	13.3 %	29.6 %	42.9% (+2.6%)	14.3 %	23.1 %	37.4% (-4.3%)	20.5 %	27.3 %	47.8% (+6.0%)

(Source: <https://apps.sde.idaho.gov/ReportCard/SchoolYear/22>)

The chart above, Comparison of Statewide to School Average ISAT % Prof-Advanced, derived from SDE District Report Card data, shows that between 2014-15 and 2016-17, the overall percentage of students who received a Proficient Score in ELA ISAT increased from 27.8% in 2015 to 39.8% in 2017, an increase of 12 percentage points or 49% improvement. In that same period the district scores ranked above state averages in two of three years.

Additionally, growth data shown in the MMCS 2016-2017 ScoreCard, shows that 33.2% of students in Math and 22.3% in ELA are trending to achieve Proficiency within 3 years or by 10th grade. The MMCS 2016-2017 Scorecard at Indicator 2 shows that Monticello's results exceeded the statewide average within 15 percentage points. Taken altogether these data demonstrate that Monticello's instructional practices are successful and confirm the district's instructional capacity to support and sustain grade level expansion.

3) Financial Capacity

- Please see attached:
 - 1) 2014 Audit p.24
 - 2) 2015 Audit p.25
 - 3) 2016 Audit p.25
 - 4) Appendix A Template Charter Petition Budget Template

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Monticello has shown a history of strong financial growth, having made gains in operational reserves annually since FY2015. As reported in Monticello's recent Charter Renewal Application, pp 7-8, the 2013-2014 PCSC Annual Performance Report ranked the school in Remediation status with 57.50% of possible points in the area Financial. Fund Balances-Ending, Actual Amounts closed the year with \$90,093 in operating reserve funds, but the district had fewer than 15 days cash. (2014 Audit p. 21).

In 2014-2015 the school changed several of its financial processes and began purposefully building its operating reserve funds, with a goal of 3 months cash reserves. The 2014-2015 Annual Report placed Monticello in Honor standing in the Financial area, with the District's 2015 Audit posting Fund Balances-Ending, Actual Amounts of \$228,981. (2015 Audit, p. 25)

The 2015-2016 Annual Report designated the district once again in Honor status in Financial, following a year of the district continuing to more moderately build its operating reserve funds. That year closed with Fund Balances-Ending, Actual Amounts of \$336,781. (2016 Audit, p. 25).

In 2016-2017, because of the reserves built, the school was able to weather a drop in enrollment, make corrective action, and finish the fiscal year with a positive operational fund balance. The result was a Fund Balances-Ending, Actual Amounts of \$283,638 (2017 Audit, p.22). This figure meets the district's goal of reserves to cover 3 months of expenses.

It is also notable that this Ending Actual Amount is \$54,657 greater than the operational reserves at year end 2014-2015 when the school was awarded Financial Honor status. Overall, since FY2014 Monticello has increasingly solidified sound financial practices, improved its financial standing, and gained the stability of significant operating reserves.

Please see Appendix A Template Charter Petition Budget Template for the Proposed Expansion's expected revenues, expenses, and net-income balance details. Taken altogether, these data show that Monticello has the management processes in place to maintain a fiscally viable organization and the existing financial capacity to sustain its proposed grade level expansion.

The Board of Directors and District Administration staff believe that Monticello has the physical facility capacity, instructional capacity, and financial capacity to successfully implement and sustain its proposed expansion.

Financial Summary					
Worksheet Instructions: This page will auto-populate as you complete the Pre-Operational and Operational Budget tabs.					
Revenue					
Anticipated Enrollment for Each Scenario:		0	232	258	280
	Pre-Operational Budget	Break-Even Year 1 Budget	Full Enrollment Year 1 Budget	Year 2 Budget	Year 3 Budget
Unrestricted Cash on Hand			\$121,360	\$0.00	\$0.00
Contributions/ Donations	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Loans	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Grants	\$0.00	\$0.00	\$86,529.00	\$86,530.00	\$86,531.00
Base Support	NA	\$0.00	\$317,680.00	\$366,550.00	\$417,777.00
Salary and Benefit Apportionment	NA	\$0.00	\$801,702.00	\$812,720.00	\$812,720.00
Transportation Allowance	NA	\$0.00	\$57,538.00	\$57,538.00	\$57,538.00
Special Distributions	NA	\$0.00	\$266,253.50	\$303,499.00	\$302,990.00
REVENUE TOTAL	-	\$0.00	\$1,651,062.98	\$1,626,837.00	\$1,677,556.00
Expenditures					
	Pre-Operational Budget	Break-Even Year 1 Budget	Full Enrollment Year 1 Budget	Year 2 Budget	Year 3 Budget
Staff and Benefit Totals	-	-	884,948.00	920,748.00	920,748.00
Educational Program Totals	\$0.00	-	72,461.00	72,406.00	71,506.00
Technology Totals	\$0.00	-	37,941.00	32,091.00	29,191.00
Capital Outlay Totals	\$0.00	-	8,955.00	4,000.00	2,200.00
Board of Directors Totals	\$0.00	-	18,047.00	18,047.00	18,047.00
Facilities Totals	\$0.00	-	329,026.00	242,478.00	242,478.00
Transportation Totals	\$0.00	\$0.00	\$82,440.00	\$82,440.00	\$82,440.00
Nutrition Totals	-	-	-	-	-
Other	-	-	650.00	650.00	650.00
EXPENSE TOTAL	-	-	1,434,468.00	1,372,860.00	1,367,260.00
OPERATING INCOME (LOSS)	-	\$0.00	\$216,594.98	\$253,977.00	\$310,296.00
PREVIOUS YEAR CARRYOVER		-	\$0.00	\$216,594.98	\$470,571.98
NET INCOME (LOSS)	-	\$0.00	\$216,594.98	\$470,571.98	\$780,867.98

RENTAL QUOTE

Date: 5/7/2018
Quote Number: 118196
Lease Term: 24 Months



Sales Consultant:

Kenna Draper
P (208) 362-6090 F (208) 362-1275
kenna@pacificmobile.com

Monticello Montessori Charter School
Sweet Water Way
Ammon, ID 83406
Erica 208-419-0670
administrator@monticellomontesorri.com

SITE ADDRESS
Temp School Expansion

Ammon,

Date Needed: 8/1/2017

Description	QTY	Classroom	QTY	
Please check your desired unit(s) and options		<input type="checkbox"/> 28x64		<input type="checkbox"/> 12x40 RR
Rental Rate	1	<input checked="" type="checkbox"/> \$1,640.00	1	<input checked="" type="checkbox"/> \$1,585.00
Ramp - ADA OPTION: 30' metal Ramp	1	<input checked="" type="checkbox"/> \$198.00	1	<input checked="" type="checkbox"/> \$198.00
Other Coffee Bar with sink and fridge	1	<input checked="" type="checkbox"/> \$223.00		<input type="checkbox"/>
Personal Property Taxes	1	<input checked="" type="checkbox"/> \$45.00	1	<input checked="" type="checkbox"/> \$16.00

Total monthly rental cost (checked items only) \$2,106.00 \$1,799.00

Delivery Freight	1	<input checked="" type="checkbox"/> \$3,420.00	1	<input checked="" type="checkbox"/> \$1,665.00
Pilot Cars - Delivery	1	<input checked="" type="checkbox"/> \$462.00		<input type="checkbox"/>
Standard Set Drop set to 30"	1	<input checked="" type="checkbox"/> \$6,468.00	1	<input checked="" type="checkbox"/> \$945.00
Tie Downs parts/labor Dirt type	1	<input checked="" type="checkbox"/> \$1,950.00	1	<input type="checkbox"/> \$910.00
Skirting- Wood OPTION:	184	<input checked="" type="checkbox"/> \$4,714.08		<input type="checkbox"/>
Skirting- Wood INSULATED		<input type="checkbox"/>	1	<input type="checkbox"/> \$3,790.00
ADA Ramp Delivery & Setup OPTION:	1	<input checked="" type="checkbox"/> \$1,260.00	1	<input type="checkbox"/> \$1,260.00
Cleaning Fee	1	<input type="checkbox"/> \$179.20	1	<input type="checkbox"/> \$76.80

Total setup cost (checked items only) \$18,274.08 \$2,610.00

Return Freight Rate In Effect At Term End	1	<input checked="" type="checkbox"/> R.I.E.*		<input type="checkbox"/> R.I.E.*
Pilot Cars - Return Rate In Effect At Term End	1	<input checked="" type="checkbox"/> R.I.E.*		<input type="checkbox"/> R.I.E.*
Standard Breakdown Rate In Effect At Term	1	<input checked="" type="checkbox"/> R.I.E.*		<input type="checkbox"/> R.I.E.*
Tie Down Removal Rate In Effect At Term End	1	<input checked="" type="checkbox"/> R.I.E.*		<input type="checkbox"/> R.I.E.*
Skirting Removal OPTION: Includes disposal	184	<input checked="" type="checkbox"/> \$1,389.20		<input type="checkbox"/>
ADA Ramp Removal OPTION	1	<input checked="" type="checkbox"/> \$1,262.00		<input type="checkbox"/>
Rate In Effect At Term End	1	<input type="checkbox"/> R.I.E.*		<input type="checkbox"/> R.I.E.*

(checked items only) \$2,651.20

Damage Waiver		<input type="checkbox"/> \$147.60		<input type="checkbox"/> \$142.65
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*R.I.E. = Rate In Effect at Term End

Note: Items manually checked will be reflected on your Order Confirmation. Two weeks notice required for pick up of building.

**Pricing does not include applicable sales tax, personal property tax, building permits or fees, low voltage systems, testing or inspections, fire ratings / sprinklers. Unless otherwise specified pricing also does not include ADA access to building, prevailing wages for site work, removal or axles / hitches, or transport pilot cars & permits. All site improvements are not included. If the site is not dry, compacted, level, and accessible by normal delivery truck, then there could be additional trip, labor, and/or equipment charges. Building pad needs to be a minimum of 1,000 PSF and no more than 6" grade difference. Extra trip charges may also occur if customer decides to stop work on-site.

Quote is good for 30 days and limited to availability of stock on hand. By signing, the customer is authorizing Pacific Mobile Structures to process the order for the selected equipment and services upon approval of credit. This authorization will convert this quotation into an Operating Lease Agreement bound by the Terms and Condition on Page Three (3) of this quotation. An Order Confirmation will be sent to the designated e-mail address on file.

Customer Authorized Representative

Date

Growth & Development Forecast Bonneville School District 93

April 18, 2018

Current Growth Northern Half of D93 (North of Lincoln Road)

- Rock River + 85 Homes
 - o Located East side of Ammon Rd. ¼ mile south of 49th North
 - o Homes currently under construction and the next division under construction
- Wolf Creek + 212 Homes
 - o Located on the corner of Ammon Rd. and 49th North
 - o Homes currently under construction and the next division under construction
- North Red Rock Estates + 100 Homes
 - o Located on the East end of Red Rock Estates East of Ammon Road
 - o Subdivision development will begin the fall 2018. Home construction will begin in the spring 2019.
- Thomasville Estates + 113 Homes
 - o Located South of 49th North ½ mile east of Crowley Rd.
 - o Home construction will begin fall 2018. Subdivision development will begin summer 2018
- Berkley Park + 343 Homes
 - o Located on the Northwest corner of Iona Rd. and Crowley Rd.
 - o Homes currently under construction and the next two divisions under construction
- Green Valley + 62 Homes
 - o Located on the Southwest corner of Iona Rd. and Crowley Rd.
 - o Homes currently under construction.
- East Village + 55
 - o Located West of Crook Rd. ¼ mile North of Lincoln Rd.
 - o Currently under development
- Guardian Homes + 60
 - o Located on the Northwest Corner of Lincoln Rd. and Crowley Rd.
 - o Currently under construction
- Additional Misc. + 47

Totals for the Northern half of D93

1077 New families

X 2.5 Children average per household

2,693 New children

Current Growth Southern Half of D93 (South of Lincoln Road)

- North Springs +16
 - o Located on the Northeast corner of Lincoln Rd. and Crowley Rd.
 - o Currently under construction
- Bridgewater + 52
 - o Located West of Ammon Rd. ¼ mile South of Lincoln Rd.
 - o Homes currently under construction and next divisions under construction
- Residences at 1st Street North + 350
 - o Located North of 1st street ½ mile West of Ammon Rd.
 - o Currently under construction
 - o Note: Residences at 1st Street South will be + 350 but not currently accounted for in the total count of these numbers
- Warm Springs Townhouse + 48
 - o Located on the Southeast corner of 1st Street and Emery Lane
 - o Currently under development
- Canyon Ridge + 36
 - o Located on the Southeast corner of Ammon Rd. and John Adams Pkwy.
 - o Development currently under construction
 - o Home construction summer 2018
- Valencia Park +106
 - o Located South of Sunnyside Rd. ¼ mile and East of Crestwood Lane
 - o Homes currently under construction
- Multi Fourplex +120
 - o Located on the West side of Ammon Rd ¼ mile South of Sunnyside Rd.
 - o Currently under development
- Olsen Park +127
 - o Located South of Sunnyside Rd. and ¼ mile West of Ammon Rd.
 - o Development currently under construction
 - o Home construction begins May 2018
- Founders Point + 40
 - o Located on the East Ammon bench on the corner of Sunnyside Rd and Founders Pointe Dr.
 - o Homes under construction
- Hawks Landing + 35
 - o Located on the East Ammon bench on the corner of Sunnyside Rd and Crown Cres
 - o Homes under construction
- Brookside + 38
 - o Located North of 49th South and Stanfield Lane
 - o Currently under development
- Granite Creek +150
 - o Located on the corner of 25th East (Hitt Rd) and 49th South
 - o Homes under construction

- Mountain Bend Estates + 90
 - o Located ½ mile East of Ammon Rd. on the North side of 49th South
 - o Homes currently under construction and the next division under construction
- Highland Springs + 82
 - o Located ½ mile South of 49th South and East of Crowley Rd.
 - o Development construction to begin May 2018
 - o Home construction fall 2018
- Woodland Hills + 176
 - o Located ½ mile South of 49th South on the East side of Ammon Rd.
 - o Development construction to begin Fall 2018
 - o Home construction spring 2019
- Addition Misc. + 52

Totals for the Southern half of D93

1518 New families

X 2.5 Children average per household

3,795 New children

Grand Total for ALL of D93 North and South

2595 New families

X 2.5 Children average per household

6,488 New children

Monticello Montessori Charter School
2018-19 Enrollment

Re-enrollment, Lottery & Waiting List Information

Submitted May 18, 2018

Re-enrollment and Lottery Application Metrics

<u>Grade Level</u>	<u>Pre-Lottery Returning Student Intention Documents Received</u>	<u>Lottery Application for Admission Accepted</u>	<u>Total by Grade Level</u>	<u>May 17, 2018 Wait List</u>
K	0	57	57	7
1	28	15	43	16
2	23	11	34	5
3	25	14	39	4
4	25	10	35	7
5	20	10	30	4
6	19	7	26	6
Total	132	124	264	49