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II. APPLICATION COVER SHEET/ABSTRACT

School Information:

Name of Proposed Charter School: Sage Charter School

School Address (if known): NA

School Location: (City/Town) Albuquerque, New Mexico

School District within which the school will be located: Albuquerque Public Schools

Contact Information:

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E-mail: montessoriday@msn.com

Partner Organizations (if applicable): NA at this time

Enrollment Information: Grade span at full enrollment **K-12** Total number of students at full enrollment **299** Please note phase-in grades.

School Year		Grade Levels		Total Projected Student Enrollment
First Year	2010-11	K		20
		1 st		21
		2 nd		21
		3 rd		21
		4 th		24
		5 th		24
		6 th		24
		7 th		24
		8 th		24=203
Second Year	2011-12	K-8	add 9 th	24=227
Third Year	2012-13	K-10 th	add10th	24=251
Fourth Year	2013-14	K-11 th	add11th	24=275
Fifth Year	2014-15	K-12 th	add12th	24=299

Abstract: Sage Charter School (SCS), a New Mexico K-12 Montessori Charter School

What is Montessori...Montessori is an educational approach from birth to adulthood. The philosophy encourages exposure to diverse cultures and acquisition of respect for that diversity. Montessori schools are found worldwide, serving students from birth through high school. Montessori education is known for its comprehensive curriculum, hands-on learning materials and a philosophy geared to meeting the needs of the “whole-child.” Montessori is also the most copied educational method.

This school looks to authentically and successfully utilize this educational approach. Montessori education has traditionally been reserved as a private school education. Sage Charter School would like to be Albuquerque’s first K-12 charter school offering a private Montessori school education in a public school setting for no fee. We believe that by providing an authentic Montessori school, Albuquerque students will have the opportunity to make the list of successful graduates that include Ann Frank, Shirley Temple, Jeff Brazos (Amazon.com) and the “Google boys” who founded the search engine Google.

The school’s K-12 Montessori curriculum choice is completely aligned to the NM Benchmarks and Standards and Student Performance requirements. As soon as the school is approved, SCS will purchase the aligned K-12 curriculum correlation from Montessori Made Manageable, (MMM) Inc. To assist the school in its accountability to the curriculum, SCS will also purchase student monitoring cards, homework sheets, report cards and teacher lesson plan books that parallel the aligned curriculum. Before or upon the opening of school, SCS staff will be trained by MMM on the proper usage of the curriculum and teachers documentation tools.

The authors of this charter are also collaborating with MMM to develop an electronic data collection system to work with the curriculum formatted on the Student Monitoring Form. This data collection system will be done on line by teachers and go into each student’s records for processing. We understand that the new prototype will be finished soon.

The school will open with grades K-8th and then add one additional grade level each year to reach grade 12 in 2014. Student groupings will be in the traditional Montessori three year age spans. Because Kindergarten is traditionally the third year of Montessori preschool, the school may be applying to add pre-K after the school has been approved. The school will serve 299 New Mexico students by providing a comprehensive educational approach using the Montessori Method of education with accelerated math and science programs

At the time of the writing of this application, Sage Charter School (SCS) is considering several location options. Ideally, we will be well-situated for easy accessibility to I-25, I-40 and public transportation. The school’s ideal facilities would be designed to separately house four different levels but within enough proximity to make the grounds feel and work like a campus with shared facilities. The campus design for a small K-12 school is ideal for developing a sense of shared community and at the same time allowing enough space for each group to function independently and successfully. Because several board members have extensive experience in school design and land development projects, the board feels confident they can develop a suitable property for the school. Other board members have knowledge and expertise in administration, finance, grant writing and K-12 Montessori education to oversee the running of the school.

The Sage Charter School board is pleased to present this charter application to the New Mexico Public Education Department (NMPED). The board is dedicated, experienced and has the ability to provide the community with an authentic, first class, K-12, Montessori academy.

- 1972, Section 504 of the Rehabilitation Act of 1973, and part B of the Individuals with Disabilities Education Act;
14. of the Civil Rights Act of 1964, Title IX of the Education Amendments of 1972, Section 504 of the Rehabilitation Act of 1973, and part B of the Individuals with Disabilities Education Act;
 15. The SAGE CHARTER SCHOOL shall provide equitable access to and participation in its federally assisted program for students, teachers, and other program beneficiaries with special needs.
 16. The SAGE CHARTER SCHOOL shall be economically sound and the fiscal management shall comply with all applicable federal and state laws, regulations and rules relative to fiscal procedures.
 17. The SAGE CHARTER SCHOOL shall provide to the Public Education Commission by the sooner of the end of the planning year or within ten (10) days of receipt of any federal or state stimulus funds a detailed plan indicating how the SAGE CHARTER SCHOOL will manage its fiscal responsibilities, the plan will include a description of the internal control procedures that the charter school will utilize to safeguard assets, segregate its payroll and other check disbursement duties, provide reliable financial information, promote operational efficiency, and ensure compliance with all applicable federal statutes and regulations and state statutes and rules relative to fiscal procedures.
 18. Meetings of the SAGE CHARTER SCHOOL Governing Body shall comply with the New Mexico Open Meetings Act, Sections 10-15-1 et seq., NMSA 1978.
 19. The SAGE CHARTER SCHOOL shall adopt policies and procedures of the governing body, that address governance, relationship to staff, professional development, the role of the governing body in policy-making, personnel decisions, budgeting, and operation of the school, including how decisions will be made.
 20. The Governing Body or head administrator of the SAGE CHARTER SCHOOL shall recognize and work with employee labor representatives, if any.
 21. The SAGE CHARTER SCHOOL shall produce a certificate of occupancy prior to opening a facility for use as a school; the facility shall meet all applicable federal and state health, safety and code requirements and be suitable for use as a school.
 22. The SAGE CHARTER SCHOOL shall develop and maintain a plan for addressing code, accessibility, health and safety requirements as well as operation, maintenance and repair of any facility it seeks to use as a school.
 23. The SAGE CHARTER SCHOOL shall develop personnel policies that comply with all applicable federal and state labor laws, regulations and rules implementing them and shall submit the policies to the Public Education Department for comment prior to the hiring of any employees.

I hereby certify that the information submitted in this application for a charter is true to the best of my knowledge and belief. I understand that I am the authorized representative of the applicant group, or the governing body, of this charter school.

[Signatures required on next page]

(Statements of Assurances page 3 of 3)

[Signature] _____ Date
_____, representative of the applicant group, or governing body
member, of the proposed Sage Charter School.

Subscribed and sworn to before me, this ____ day of _____, 20__.

[Notary Seal:]

[signature of Notary]

[typed name of Notary]

NOTARY PUBLIC

My commission expires: _____, 20__.

IV. CHARTER SCHOOL MISSION AND STATEMENT OF NEED

IV. Mission Statement

The mission of the Sage Charter School (SCS) is to provide a free K-12 Montessori education for students of all abilities and backgrounds wherein each student will develop a set of skills and abilities to successfully meet their educational goals and life long fulfillments as productive citizens and members of a global community.

IV.1. The school will know that it is achieving its mission by the following

The SCS will utilize various assessments and feedback methods to determine whether the stated mission is being achieved.

- Entering students will be given general assessments in reading and math to help determine ability and placement.
- Students are required by the state of New Mexico to take the Standards Based Assessments tests (SBA) at the 6th, 7th, 8th, 9th, and 11th grade levels.
- Annual Yearly Progress (AYP) will be achieved showing student ability to master these standards. Recent data reports less than 50% of NM schools meet AYP.
- The advanced Montessori curriculum will strengthen the state data by achieving greater student participation and SBA scores in all testing populations.
- In addition to Montessori classroom assessments, students experience daily feedback (loops) with the use of the classroom materials, upper level teachers use short cycle (formative) assessments which allow students, frequent opportunities for self-reflection and improved learning.
- End of semester tests will be given in all subject areas in the upper grades for the assignment of high school credits. All high school students must pass the New Mexico High School Competency Exam before graduating, which can be taken in 10th, 11th, and 12th grade.
- Upper grade students will take the pre-ACT (PLAN), pre-SAT (SAT) and be encouraged to take the ACT and SAT at the appropriate times in preparation for college entrance requirements. They will also be encouraged to take all Advanced Placement (AP) examinations that correspond with their course work.
- The granting of college credit for AP exams will guide SCS in assuring the school's mission of producing motivated learners is being met.
- SCS graduates will not only access the state's best college system but also many of the world's leading universities. Acceptance rates in these colleges and universities will also serve as a measure success in preparing students for real-world success.

- In addition to traditional methods of assessment, steady growth in overall enrollment each year will indicate success.
- Open avenues of communication and feedback from parents, students and community members as how SCS might better serve its students, parents and community in meeting the school's mission.
- Professional development (PD) will also be a vital component in ongoing assessment to demonstrate how successfully SCS leadership interacts with its students in providing a complete Montessori curriculum for every grade with competently trained Montessori staff.
- PD will also serve as an ongoing form of assessment to measure student achievement and to assure the school community that the SCS Montessori curriculum, philosophy and practices follow state requirements and standards.

A. Dual Vision

Dr. Montessori was a Renaissance woman whose vision for peace moved her to create a better world by educating children to meet the best of their human potential.

Likewise, our vision is to:

1. produce students who become Renaissance learners and through the holistic curriculum develop an appreciation for their place in the universe. Our graduates will be a diverse group, sensitive to the human condition, broadly educated and technically prepared to succeed in the 21st century.

2. offer students an authentic Montessori education, meeting their needs as learners, and developing skills for life so that as graduates they can access any type of post-secondary opportunity whether it be employment, college or a technical school.

Upon graduating each student will have:

- A clearly demonstrated set of academic skills as defined by NMPED Requirements
- Experience in community service
- A clear awareness of their rights and responsibilities as citizens
- A personal development plan for the years beyond our school

B. Point of View

The school adheres to the point of view that intelligence is not rare and that self-realization is the foundation for all future fulfillments.

IV.2 Statement of Need

Since the 1960's, testing, research, polls and public opinion has shown that the student achievement gap is widening. Despite repeated warnings by experts about "Schools that Fail" and the "A Nation at Risk" report, Aaron Pallas' 1989 research study found nearly 40% of all students were still "at risk" of failing. He found at risk students not just in poverty areas and specific ethnic locals, but also over an even broader range of circumstances.

Fortunately, with all the research on failure, came data as to what schools needed to be successful. A 2008 research forum on mid-high school improvement found the one common thread in each success story was "that student success was directly related to a school's atmosphere of success."¹ Montessori schools and Montessori education fit this factor.

Montessori's three-year age span groupings provide a developmentally appropriate "atmosphere of success" within each classroom. Preschool classrooms contain ages 3 through 6, this includes Kindergarten. Lower elementary, grades 1-3, contain ages 6-9. Notice the cross-over of age 6. This important success factor is discussed further in the application. Mixed age groupings continue into 4th -6th grade upper elementary, 7th -9th grade mid-school and 10th -12th grade high school. Preschool through elementary classrooms are equipped with shelves full of beautiful hands-on materials that are designed to meet the interest of the child and teach critical concepts from the curriculum. 7-9th grade and 10th-12th grade level classrooms provide classroom spaces that are designed for seminar discussions, researching, science studies, and outdoor spaces for plant, animal and environmental studies. Dr. Montessori considered students age 12-18 as adolescents. Adolescent studies take the students into their communities to learn first hand about technology and society and how it functions. History is the thread that links student studies in science, math, ecology, great literature, the arts, government, business, religion, philosophy and human development. Students are taught study skills, time management, everyday living skills, and a character education built on respect. Students work at their own pace, but within required time frames to meet state requirements.

J. McVicker Hunt has written that Montessori has come the closest to solving the "match" in Education. (Hunt 1968) He explains the "match" concept as placing the level of presentation to the child at the child's developmental and skill level for optimal learning and success. It is no wonder that Montessori education is the most widely researched,² fastest growing educational method in the world. Collected data presents solid evidence that the method is successful for all children including children at risk.³

Under the leadership and guidance of an experienced, Montessori trained Principal, SCS will be vigilant in its follow-through with the delivery of the Montessori curriculum and record keeping data of student success during this first five-year contract. Just as Dr. Montessori studied her research data on children to develop "a plan for student success," SCS must and will follow the school's aligned curriculum and collect data to design "a plan for each student's success" in the Sage Charter School.

¹ Center for Social Organization of Schools forum January 2008 Improving the Transition from Middle Grades to High Schools: The Role of Early Warning Indicators

² Lillard, Angeline Stoll " Montessori: The Science Behind the Genius" 2005

³ Pickering, Joyce S. M.A. / A.M.S. Montessori Applied to Children at High Risk, Appendix J

V. EDUCATIONAL PLAN

V. A. CURRICULUM FRAMEWORK

V. A. 1. Philosophy and Approach to Instruction

Montessori educational philosophy is based on the extensive research of Dr. Maria Montessori. Her research on “the natural needs and tendencies” of children and her knowledge of the Planes of Human Development led her to create an educational philosophy and approach designed to meet the learning needs of children at each plane of development.

Through observation of preschool and elementary children’s play, Dr. Montessori saw that the “hand” was the tool for learning. She saw that children “needed to touch to learn.” Dr. Montessori’s understanding of the child’s needs led her to develop an extensive curriculum with unique hands-on learning materials to direct and support learning. The success of Dr. Montessori’s “hands on materials” also popularized the “constructivist theory of education” that is so popular today. Montessori learning allows students to be actively engaged in meaningful, concrete experiences from K-12, particularly in math and sciences.

Montessori learning

- is a process of invention where students construct their own knowledge and become intrinsically motivated to learn.
- uses aligned curricula (as stated in section V.A.3) customized to student’s prior knowledge and emphasizes hands-on problem solving connections between previously learned facts and new understandings.

Montessori teachers tailor their teaching strategies to student responses and encourage them to analyze, interpret, and predict information and learning direction. Beginning in the lowest grades, Montessori teachers facilitate open-ended questioning and promote dialogue among students in the same vein as a Socratic Seminar discussion. As part of the Montessori learning process, assessment will allow students to play a large role in judging their own progress.

We chose this methodology based on supportive research data.

1. Research from a wide range of sources supports the philosophy and success on improved student learning at all grade levels.
2. Research data confirms the success of “mixed-age” developmental groupings, one of the foundation blocks for the method’s success.
3. **Montessori is one of the most researched educational systems in the world.** In a recent publication, Montessori: The Science behind the Genius,⁴ Prof. Angeline Stoll Lillard, Associate Professor of Psychology at the University of Virginia, presents current scientific research that provides astounding support for Dr. Montessori’s ingenious alternative to meeting student needs.

⁴ Lillard, Angeline Stoll “ Montessori: The Science Behind the Genius” 2005

We are confident our chosen educational method is likely to result in improved student performance:

- because research data provides positive evidence for the success of the method; and,
- the method is a scientific approach to teaching and evaluating outcomes and then making plans for continued success.

In further developing her educational method, Dr. Montessori looked at education as she looked at medicine, from a scientific prospective, “The whole is equal to the sum of its parts”. To Dr. Montessori, that meant that she needed to address all the needs of a child, prescribing an education for success. Dr. Montessori’s educational philosophy evolved from her data and she developed a method as the way to accomplish the desired result.

The following snapshots of philosophy and approach are arranged in terms of educational climate, structure, materials, schedule, assessment and outcomes. They provide a picture of the school to parents and prospective students while detailing specific aspects unique to Montessori.

Montessori Snapshot #1: Educational Climate K-12

- **Independence and Self-discipline**

Success in school is directly tied to the degree to which students believe that they are capable and independent human beings. By allowing students to develop a meaningful degree of independence and self-discipline, Montessori sets a pattern for a lifetime of good work habits and a sense of responsibility. Students are taught to take pride in doing things for themselves carefully and well.

- **Prepared Environment.**

This name reflects the care and attention that is given to creating a learning environment that will reinforce the children’s independence and intellectual development. Students are typically found scattered around the classroom, working alone or with one or two others. They tend to become so involved in their work that visitors are immediately struck by the peaceful atmosphere.

- **Atmosphere of collaboration**

In an atmosphere in which students learn at their own pace and compete only with themselves, they learn not to be afraid of making mistakes. Students quickly find few things in life come easily, and they can try again without fear of embarrassment.

Competition:

Students compete with each other every day both in class and on the playground. Dr. Montessori was never opposed to competition on principle. Her objection was to using competition to create an artificial motivation to get students to achieve. She believed that students must learn because they are interested, not simply to earn the highest grade in the class.

The program allows competition to evolve naturally among students, without adult interference, unless the students begin to show poor sportsmanship. The key is the student’s voluntary decision to compete, rather than having it imposed by the teacher.

- **Groupings**

The kindergarten curriculum format is identical to the elementary format differing only in content and classroom management. By mid-year, most kindergarteners have

transitioned into the beginning elementary curriculum. Groupings continue into mid-high 7th-9th grade and senior high 10th-12th grade.

Montessori Snapshot #2: Structure and Materials K-12

1. Scientific Approach to Education

Dr. Montessori's medical training naturally led her to analyze student learning by the same "scientific process" she used to analyze health. By observing, researching, collecting and analyzing health data, Dr. Montessori could make recommendations for patient improvement. The same "scientific process" proved true for improved student learning. This scientific process became known as The Montessori Method.

2. The Montessori educational approach works with student's natural needs and tendencies

making learning easier, more productive and ultimately more successful. Dr. Montessori believed that to completely satisfy the needs of the "whole child", doctors as well as teachers needed to consider the social, emotional and spiritual (moral values) aspects of human development in their work.

Montessori's philosophy provides:

- multi-sensory approach
- concrete learning materials,
- a sequential, spiraling curriculum
- unique and consistent teaching
- data driven and data proven approach
- educational philosophy designed to meet the developmental needs of the student.

3. Elementary, ages 6-12

Prepared environments set structure

The classroom is set up with learning materials in sequences that follow their "prescribed curriculum". Students quickly learn to find their way around the room because the order is consistent and makes sense.

Teachers:

- present mainly individual and small group lessons
- present brief, efficient age appropriate presentations.
- capture attention and spark interest with key lessons for further age appropriate research.

Montessori classrooms tend to fascinate both children and their parents. They are normally bright, warm, and inviting, filled with plants, animals, art, music, and books. Classrooms are filled with interest centers of intriguing learning materials, fascinating mathematical models, maps, charts, fossils, historical artifacts, computers, scientific apparatus, perhaps a small natural-science museum, and animal specimens. As Montessori scholar, Jean Miller, states:

"The multi-age elementary classroom design aids the child in his own natural development which includes basic physical, emotional and cognitive skills necessary for functioning in his society and world and helps him gain an overview of the development of the universe, the solar

system, earth, life on earth, early man, civilizations and scientific classification. This knowledge is an aid to his own natural inner development.”

4. Adolescence, ages 12-18

The school design is an integration of the current research on human development, the trends and issues in education, and the Montessori philosophy. Level expectations are geared to successfully ready students for entrance to high school, graduation and beyond. The senior high level of the program is to prepare students to meet the state standards and graduation requirements for HS. SCS will provide students the opportunity to be self-confident and gain self knowledge, to belong to a community, learn to be adaptable, to be academically competent and challenged, and to create a vision for their future.

The School Structure offers:

- A learner-centered environment
- A developmentally responsive curriculum
- A teaching team of Montessori Teachers with additional adults as resources
- Parent-teacher-student partnerships
- Multi-age groupings
- Large blocks of learning time
- Peer and cross-age teaching
- Classroom areas are set up as laboratories, libraries, mini museums with hands-on materials

The Early Adolescent is:

- An active, self-directed learner
- A vital member of the class, school, city and global community
- A vital member of the teacher –student–parent team
- Responsible for keeping commitments, being honest and respectful

The Curriculum and Instruction Includes:

- Interdisciplinary themes
- Learning how to learn strategies
- Personal learning mastery plans, coaching and exploratory activities
- Long-term cooperative learning projects, sense of community and social interaction with peers
- Meaningful and challenging work
- Activities for self-expression, self-knowledge
- Activities to foster interdependence
- School and community service projects
- Activities that allow work with and on the land

7th -12th grade Teachers:

- facilitate learning
- consult with students

- create a positive climate for learning
- communicate with parents
- serve as community role models.
- provide more in depth lessons, tying subject matter together,
- encourage student research, discussion and opinion

7th -12th grade Teacher Expectations include development of:

- spirit and imagination;
- independence and self-esteem;
- respect, honesty, and integrity; and,
- observation, questioning and exploration of independent ideas.

5. Mixed –Age Grouping Advantages

One of the obstacles in education for many students is that each year they must start “each year” with a new teacher and classmates. Then just as the classroom is becoming a working community, the school year is over. The advantage of mixed age groupings is that students move with one teacher or group of teachers for a three-year period. This enables students to pick up where they left off in June, and immediately move forward in the curriculum and progress the first week in the new school year. No time is lost!

The classroom community grows stronger and the school’s core values of peace, integrity, community and tolerance become meaningful experiences not just mere words.

Montessori Snapshot #3: Schedule K-12

The overall picture is to help the student develop into the successful adult they want to become. This requires knowledge of human development on the part of the teacher and an educational methodology that is designed with the student’s development in mind. From there, we organize curriculum into time frames that can be successfully managed.

There are schedules for all levels in the classroom.

Student time management

- **Elementary** students have daily or weekly contracts within the school year
- **Mid-high and High School** students have daily, weekly and semester expectations where in they learn time management. Students learn to make their own work schedules.

Classroom daily schedules

- **Elementary:** circle, lessons & work-time, lunch, work or special activity, closing circle, field trips and guest speakers.
- **Mid-High and High School:** daily group meeting followed by breakout into “pods.” Pod groups are divided by ages 12-15 and 15-18. Each pod stays together throughout the daily schedule including lunch, work time/activities, planned community service projects, etc.

Montessori Snapshot #4: Assessment K-12

Assessment and evaluation is made by:

- reviewing data from required testing;

- designing student improvements plans based on data; and,
- daily, weekly and monthly progress evaluated by pre and post testing.

Pre and post testing also occurs within the **K-6 framework** of the Montessori 3-part lesson format described below.

Teacher presents lesson to student;

Students repeat the lesson;

Students solve other problems with the same method;

Students check their own work with teacher supervision and direction.

In the beginning of the year, each student is pre-tested for placement in each curriculum area. Pre and post testing also continues through the year for each new concept presented.

Post testing is the third step of each Montessori lesson/work. Post testing is the evaluation of student understanding.

Measurable Outcomes

Students will:

- demonstrate mastery
- create and solve problems
- help and work with others
- participate as evaluators of their own progress
- participate in setting their goals
- meet or exceed grade level expectations.

See mission statement, page 8 for testing requirements

Additional Testing:

Supplemental traditional materials

Montessori Snapshot #5: Measuring the outcomes K-12
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Success is measured by:

- Achievement based on and adhering to No Child Left Behind (NCLB).
- Achievement on New Mexico Student Achievement Tests
- Meeting or exceeding AYP
- Success on Individual Education Plan (IEP)
- High school graduation testing results as defined in the school mission
- Achievement in the Montessori Curriculum according to the Method's Standards
- Evaluating progress of meeting the school mission statement expectations

Montessori Snapshot #5: Additional Outcomes K-12

Method develops skills/abilities for student driven learning that naturally develops their unique talents, possibilities and possibilities and self-esteem.

Students – Elementary through High School

- **Learn at their own pace**, and in the ways that work best for them as individuals. Teacher is flexible and creative in addressing each student as a unique individual. Rather than present students with loads of right answers, Montessori educators keep asking the right questions, and lead them to discover the answers for themselves.
- **Discover learning is its own reward**, as each success fuels a desire to discover more.
- **Do their own research**, analyze what they have found, and come to their own conclusions. This applies to all students and is appropriate to age and ability.
- **Think independently and become actively engaged in the learning process.**
- **Grow into leadership.** Older students in the classrooms are encouraged to model and mentor the younger students in the class. Because the younger students naturally look up to and follow the older children, the older students gain leadership experience and the younger children learn about leadership by example. Younger students look forward to being models when they move up to another level. As students move through each third year grouping, they understand more about leadership and responsibilities.
- **Experience empowerment.**

Elementary teachers:

- present mainly individual, and small group lessons
- present brief, efficient age appropriate presentations.
- capture attention and spark interest with key lessons
- for further age appropriate research a sense of community and allows students to feel comfortable and focus on the tasks at hand. Students learn better and feel better about learning. Students begin to feel empowered as they take personal responsibility and pride in their accomplishments.

All students ages 6-18 Outcome-Based Education (OBE) / Montessori

- **Develop a sense of belonging to a school family.** Dr. Montessori sought to create a community where individuals could learn to be empowered, where students could learn to be a part of families, where they could learn to care for younger children, learn from older people, trust one another, and find ways to be acceptably assertive rather than aggressive. Students discover their own innate abilities and develop a strong sense independence, self-confidence, and self-discipline.
- **Absorb school values.** Students value meaningful personal experiences learned in school. They have good feelings about learning, getting along with others and they feel empowered that their opinions and actions can make a difference in “their world”.
- **Values become the means for change for students and their communities.** Students who understand responsibility as a student, classmate and mentor, grow to apply that understanding to themselves, their families and communities.

V.A.2. Description of the Curriculum

The Montessori curriculum is organized into a Spiral of Integrated Studies.

In the early years, lessons are introduced simply and concretely, and re-introduced several times over succeeding years at increasing degrees of abstraction and complexity.

During the following years the course of study for all levels uses an integrated thematic approach that ties the separate disciplines of the curriculum into studies of the physical universe, the world of nature, and the human experience. Literature, the arts, history, social issues, political science, economics, science and the study of technology all complement one another.

Scope and Sequence sample for K-6 is available in Appendix A-1. The school will purchase the Montessori Scope and Sequence for grades 7th -12th grade before the opening of school. See SMART GOALS in section V.C

Curriculum for mid-high ages 12-15

During the planning year, SCS will solidify curriculum support textbooks and materials choices that meet state requirements and which parallel the mid-high (12-15) curriculum.

Curriculum for senior-high ages 15-18

During the planning year, SCS will investigate NM approved 9-12th grade curriculum and texts that support our aligned Montessori curriculum. Within the first year of operation, SCS will choose the upcoming 9th grade curriculum texts SCS believes will best integrate into the Montessori Philosophy. The next year SCS will evaluate the choice success and choose the 9th and 10th grade tests and so on through grade 12. SCS will have an aligned K-12 Montessori curriculum on or before the opening of school for each additional level as it is added to the school.

This integrated approach is one of Montessori's great strengths.

As an example, when students study Africa, they also read African folk tales, create African masks and make African bloc print dashikis in art. Learn Swahili songs in music and traditional folk dances, and study the ecosystems, flora, fauna, and natural resources. Montessori schools offer a rigorous and innovative academic program.

The basis of the Montessori approach is the simple observation that children learn most effectively through direct experience and the process of investigation and discovery.

The daily schedule of a typical day's work is divided into "Fundamentals" that have been assigned by the faculty and self-initiated projects and research selected by the student's work to complete their assignments at their own pace, typically with care and enthusiasm.

Scientific Observation is the key.

The basis of the Montessori approach is the simple observation that children learn most effectively through direct experience and the process of investigation and discovery. The daily schedule of a typical day's work is divided into "Fundamentals" that have been assigned by the faculty and self-initiated projects and research selected by the student's work to complete their assignments at their own pace, typically with care and enthusiasm. As seen in the descriptive curricular example in section V #4, Strategies and Methods

Teachers closely monitor their students' progress, keeping the level of challenge high, at the appropriate developmental level. Teacher's feedback to students and parents, help students learn to pace themselves and take a great deal of personal responsibility for their studies, both of which are essential for later success in college and in life.

We encourage students to work together collaboratively, for many assignments can only be accomplished through teamwork. Students constantly share their interests and discoveries with each other. The youngest experience the daily stimulation of their older friends, and are naturally spurred on to be able to "do what the older students in their levels do."

Curricular Expectations: Based on the Planes of Human Development
--

Developmental Level: I

Birth to age 6 - The Absorbent Mind: includes Kdg

Developmental Level: II

Ages 6-12 - Self-Construction –Elementary

Students develop skills to become self-sufficient, prove their independence and help their neighbor. They have a hunger of knowledge and understanding. Our hope is that the child loves everything learned, for mental and emotional growth is linked. Each classroom is dedicated to educating the whole child. Students learn to be responsible for their individual work, the group's work and the community's work.

Curriculum is based on traditional elementary subjects, presented at an accelerated rate and woven together to show the inner connectedness of subjects. Students are presented great lessons that teach about the origins of life, the history of man and great accomplishments. Time lines are used to teach about the development and needs of cultures. Math, reading and history are the core subjects that act as bridges to other subjects. For example, Geography is not just physical and political locations but it is also related to history in terms of the development of the universe and time.

"The secret of good teaching is to regard the child's intelligence as a fertile field in which seeds may be sown, to grow under the heat of flaming imagination. Our aim therefore is not merely to make the child understand, and still less force him to memorize, but so to touch his imagination as to enthuse him to his inmost core."
Maria Montessori

Developmental Level III

Ages 12-18 Community and Society - Middle and High School

Dr. Montessori believed the key to educating the adolescence was that, if you treat them with respect and meet their needs, they would develop into their potential.

Middle and High School students experience a program that:

- commits to create a holistic, developmentally responsive learning community that protects supports and empowers the adolescent on their quest for identity, autonomy and interdependence
- develops caring, confident young adults who view themselves as compassionate global citizens and committed caretakers of the earth

The curriculum is based on:

- State requirements as defined in the school mission on page 8
- integration of Montessori philosophy and
- academic subjects woven together (demonstrating the interdependency of all things)
- the developmental needs of early adolescence
- state of the art learning theory
- 21st century life skills include place based learning-learning outside the classroom walls.

“Adolescence is the ‘sensitive period’ for developing feelings of justice and personal dignity. These feelings are the most noble of characteristics and ought to prepare the young adult to become a social being.”
Maria Montessori

Adolescence curriculum includes

- full framework for algebra, geometry, trigonometry, calculus; chemistry, biology,
- and physics; literature and writing; environmental systems and geography; visual arts,
- drama, and music; psychology and human development, history, theory of
- knowledge interdisciplinary experiences focusing on change, nature, society in
- keeping with the themes found in cosmic education (a global view of the world)
- of working together for the “common good of everything.”

By weaving academic subjects together and becoming connected to the community students will come to realize Dr. Montessori’s vision for peace through understanding the interdependency of all things. Students will experience “diverse specialized environments” including in-depth connections with many of the cultural institutions located in New Mexico.

Students experience a cultural immersion in the community by a place-based approach that fully integrates the scope and sequence of the curriculum with the neighborhood’s institutions and residents. These include museums as well as geographic and other cultural site.

We do this by providing continues opportunities for students to succeed in academic classes,

work projects, outdoor challenges, interpersonal relationships, community service, peaceful resolutions of conflict and creating a personal vision.

V.A.3. Alignment with NM Standards

The school's K-12 Montessori curriculum choice is completely aligned to the NM Benchmarks and Standards and Student Performance requirements. As soon as the school is approved, SCS will purchase the aligned K-12 curriculum correlation from Montessori Made Manageable, Inc. (MMM). To assist the school in its accountability to the curriculum, SCS will also purchase MMM report cards, teacher lesson plan books, and student homework sheets that parallel the aligned curriculum. Before or upon the opening of school, SCS staff will be trained by MMM staff on the proper usage of the MMM curriculum and teachers documentation products.

The authors of this charter are also collaborating with MMM to develop a data collection system to work with the curriculum formatted on the MMM Student Monitoring Form. The data collection system will be done on-line by teachers and go into each student's records for processing. Hopefully MMM's new prototype will be finished soon.

The Montessori curriculum is a perfect match to the NM Benchmarks and Standards and Student Performance requirements because it is completely aligned and often exceeds time frames for expected mastery in all required content areas. Having the opportunity to provide one continuous K-12 curriculum framework, within a developmentally appropriate method coupled with a philosophy that supports both is truly a wonderful opportunity of SCS students. The program is set for student success.

V.A.4. Strategies and Methods:

1. The school will use traditional Montessori procedures and strategies to teach the Montessori program. These include but are not limited to:

- Key impressionistic lessons (example provided below)
- Student lessons from Montessori teacher lesson albums
- Specific Montessori materials/equipment designed for the curriculum and lessons
- Additional hands-on materials as needed
- Student made texts, tests -where age appropriate
- Work Plans for time management, contracts for older students
- Use of Fine Arts: Art, Music and Dance, Poetry, Drama integrated into studies to make the lessons "come alive"
- Fine Arts are also taught for their own intrinsic values
- Cooking, gardening, community service, etc., as related to studies
- Educational trip trips and activities which support curriculum learning
- Celebrations of life in the community- holidays, historical events
- Classrooms in the community- field experiences
- Socratic discussion methods
- Traditional support materials, test book and materials for upper grades
- Blooms Taxonomy materials that extend and enrich the curriculum

- Technology in the classroom for research, presentations, technical use for writing, resources, and technology as a resource

2. The curriculum sequence is designed will meet the learning needs of the students because within each classroom there is developmentally appropriate curriculum spanning three or more grades. Student working at, above or below grade level in any subject will find a complete level of curriculum. The curriculum sequence assists students who need to move ahead, are working at level. The sequence gives struggling students opportunity for review and mastery before moving forward. In this way, students are assisted toward meeting the NM Standards

3. A descriptive example of curricular strategies and methods in action used in the classroom follows:

The following “big” lesson refers to a lesson modeled after the “big 5” Montessori Impressionistic Lessons for Elementary students. These lessons tell of significant events in history such as the “scientific version” of the big bang, timeline of writing, timeline of math/counting, timeline of life on earth and timeline of humans. These lessons are often dramatic presentations that spark student imaginations and interest.

The following lesson is a time line work that extends from the needs of humans-people through the ages.

Descriptive curricular example:

History, Level 11, 6-9 classroom (second grade)
 Fundamental Needs of Man, Key/ Impressionistic Lesson
 Topic – History of Light/ Light through the Ages –dramatic teacher presentation
 Previous Work- BC/AD Timeline
 Approx time 45 minutes

Materials needed:

Time period labels: Prehistory, Egyptian, Greek/Roman, Middle Ages, Renaissance, Modern Times

Props for each time period: i.e. meat fat in a bone or shell (prehistory); large mat for display of props and labels; unique period for the presenter- (I’ll choose caveman).

Purpose of the Key Lesson: How man made light through the ages, Concrete experience, appreciation of man’s ability to use his brain to solve problems Since this is a big lesson, prepare the lesson when the students are out of the class or keep all items in a box until each is presented during the lesson.

Presentation: Students sit on the floor facing a staged area when the drama will take place. Students get excited with these dramatic lessons and look forward to each new presentation. Everyone is quiet and still, waiting for the “show to start.” Teacher tells the students that they are

going back in time to the beginning of humans-when some people lived in caves and wore animal skins to keep warm– Teacher puts on cave clothing over modern clothing –represents going back in time. At this point it is hard for the teacher to keep a straight face because the class is totally involved with the story. Teacher makes a pretend fire on the floor, cooks meat watching the fat drip from the stick into the fire that makes splashes of light as they burn. Teacher use old cow bone or sea shell to collect dripping fat to burn at a later time when it is dark-add a wick-piece of dried plant and wow-the first candle!

The teacher places prop on the correct time line period- Prehistory. Teacher continues presentations for all periods through modern times changing clothing and props for each period. Exact time frame or place is not important at this point. This is an impressionistic lesson. Student work and extended research let them find the interesting details.

Follow up lesson: History of Lighting- student work 3 part card (Pictures, labels, and definitions/story) Teacher presents the lesson to the children in the same format as the child will do the work.

Abstract experience of the concrete key lesson- Teachers first lesson was concrete- now student work is with object or pictures, labels and definition cards which follow the same sequence and concepts the teacher demonstrated in the first dramatic presentation with the cave clothing and objects.

Students watch the teacher use a cloth, paper time line with clearly marked periods. Students watch the teacher place the picture, name and definition cards under the appropriate period of time.

At some point during or at the end of the lesson, students are invited to do the work.

After completing the work, children show their understanding of the work by making a book, writing an historical story about lighting, creating a brief play about lighting, or doing in-depth research about one period of lighting and writing a report.

4. Professional Development required to deliver the curriculum

SCS will need to hire certified Montessori teachers with a NM teaching license to deliver the promised Montessori program.

Qualified, licensed teachers who wish to become licensed Montessori teachers may apply if they are willing to take the year long training required for each level. Depending on the school's budget and available grant monies, the school may or may not be able to financially sponsor teachers for teacher training. SCS does not guarantee that taking Montessori training automatically hires an applicant or renews a contract. SCS will provide in-house in-service Montessori workshops during the teacher in-service on scheduled Wednesday afternoons during the school year.

All teachers must be Montessori trained for the level they teach in order to insure that the school provides the best possible presentation of the curriculum for each student. The American Montessori Society (AMS) recognizes authentic Montessori teacher training programs that offer outstanding teacher training programs. SCS will ensure the school hires NM certified teachers with a Montessori teaching certificate at the level they are to teach. Being Montessori trained is simply not enough. The teacher's Montessori certification must be from a Montessori Teacher Training Program that is accredited by the Montessori Accreditation Council for Teacher Education (MACTE). MACTE is the only international organization that approves USA Montessori teacher training programs. (see Appendix M)

Steps to be an SCS applicant:

- NM state certified/licensed teacher
- Montessori Teaching Credential from an AMS or other MACTE approved Montessori Teacher Training program

V. B. EDUCATIONAL PROGRAM

1. Length of School Day and School Year /per house bill #691 2009 -180 school days

- The proposed length of the school day is 7 hours per day .
 School day will begin at 8:30am and finish at 3:30pm. M-F
 170 full days x 7 hours= 1190 hours
 10 half days x 4.5 hours= 45 hours staff in-service
 Sage 180 days 1235 hours
 APS 990 hours
 Sage 245 additional instructional time about 20%
 more Instructional time for student success
- The school day is extended to allow for additional class time to meet the curriculum requirements. Extra time has been allowed to include PE twice a week in K-6, and three times a week in grades 7-12. The school is committed to improving student health and well-being.

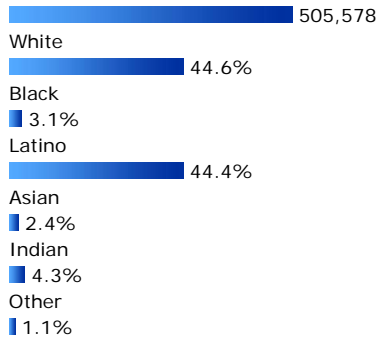
2. Grade Levels, Class Size and Projected Enrollment:

- The charter school proposes to serve grades K-12.
- The school is proposing a phase in of grades. The School will open with grades K-8. In that way, the school can offer a complete K-6 elementary program and the first two years of Mid-high. Opening year students in the 8th grade will experience two years (8th and 9th grade) of the mid-high (7-9th grade) before entering the senior high grades 10-12.
- The rationale for this method is that students entering the school in 8th grade (the opening year) will have two years of the Montessori program before moving into the senior high (10th - 12th grades) This plan will also provide the school extra time beyond the planning year to ready the senior year, as the students graduate into the next grade.
- The school's total projected enrollment is 299 students
- Projected class sizes are as follows:

Kdg-20,		
1 st , 2 nd , 3 rd - grades	21 student in each grade	Elementary 1 grades 6-9
4 th , 5 th , 6 th - grades	24 students in each grade	Elementary 2 grades 4-6
7 th , 8 th , 9 th - grades	32 students in each grade	Mid-high grades 7-9
10 th , 11 th , 12 th -	32 students in each grade	Senior high grades 10-12

- **Projected Demographics**

From the following chart taken from the web, we can predict the general following ethnic percentages of students for SCS.



The income levels will vary dramatically depending on the location of the school. At the Lowell Elementary School approx. 90-95 % get free or reduced school lunch compared to Monte Vista Elementary School where less than 25% qualify and where at Navajo Elementary 99.5% qualify.

We can assume from the ethnic demographics that our student population will be similar. But we must consider that since we do not offer a bus service, the demographic incomes will be more mixed than if we were located in a residential area as public schools usually are located.

3. **Graduation Requirements**

See Appendix K New NMPED Graduations Requirements 2009.

SCS follows the NMPED requirements for High School Graduation. SCS may request waivers from the NMPED to increase graduation requirements if the evolving curriculum requirements change.

Proposed change in PE requirements: [22-13-1.1.]

Our goal to educate and meet the needs of the “whole Child” includes health. We are planning to offer more PE classes than are required by the NMPED. SCS felt that it was necessary to lengthen the school day and add more hours in order to accommodate the PE an extra curriculum.

V. C STUDENT PERFORMANCE EXPECTATIONS: SMART GOALS

Sage Charter School SMART goals are available in Appendix N. On the provided disk, each appears separately. Some of the goals are longer and will appear as labeled in Appendix N.

V.D.1. PLANS FOR EVALUATING STUDENT PERFORMANCE K-6

Sage Charter School uses a mixture of formats to evaluate student performance, Montessori observations, Outcome-Based Education (OBE)-ability and various NMPED required testing. All provide the school, the NMPED and the stakeholders with a broad picture of Sage student performance.

This section is divided into two parts, V.D.1 and V.D.2.

General Montessori assessments are found in both sections to show Montessori accountability. Specific NMPED requirements are separated by K-6 and 7th-12 grade requirements.

SCS participates in and complies with all state regulations with regard to remediation. SCS has adopted the standardized test and writing test prescribed by the State Department of Education. Results of all testing are included in the school Report Card.

Assessments, General NMPED

Standardized Assessments

SCS uses several means to assess student achievement.

- Placement tests are given at the beginning of each year
- NM State Standardized Achievement/Assessment tests are given each year to assess student progress as required by law.
- The NM Alternate Assessment is used as the state mandated test for certain students with Individualized Education Program's (IEP).
- Specific to level III mid-high school

Montessori Assessments/Plans

School-wide assessment plan that is comprised of several components:

1. The plan includes a variety of relevant, authentic, and criterion-based assessments that most effectively measure the school's actual classroom instructional effectiveness towards fulfilling our goals and aims, and reaching the highest possible student achievement.
2. The assessment plan includes full participation and planning for student success in New Mexico mandated norm-referenced assessments including state-developed tests, state-approved criterion-reference testing, testing for grades K-12 when developed, and writing/written testing as required.
3. The school's classroom-level assessments include custom criterion-referenced assessment activities and rubrics aligned activities for all grades, all classes, and all content. These school assessments document the student's on-going progress towards successful achievement of the Standards and include activities and evaluations preparing students for a critical application of concepts learned.
4. Measures of Academic Progress (MAP) is designed to be utilized for every student, every grade, as a norm-referenced assessments (i.e., state-mandated tests for demonstration of mastery/performance) are given by the school to provide additional information regarding

- student achievement and demonstration of performance/mastery level.
5. State Assessments (i.e., state-mandated tests for demonstration of mastery/performance) are given by the school to provide additional information regarding student achievement and demonstration of performance/mastery level.
 6. Portfolios: In addition, all students are required to maintain representational reading, writing, and math portfolios of selected teacher generated assessments, performance evaluations, projects, reports, etc. These are utilized for both grading and conference purposes. The portfolios are utilized in a (primarily) “student-driven” process that allows for self- and peer-evaluation opportunities and authentic academic goal setting to be realized.
 7. All skills and abilities taught and assessed at the school are not considered mastered until the student demonstrates an 80% or above proficiency level. All students are expected to meet this standard. The school’s “internal” grading system follows a traditional grading scale of:

Level	Grade	Score
Highly Proficient	A	90-100%
Proficient	B	80-89%
Moderate Proficiency	C	70-79
Limited Proficiency	D	60-69%
Deficient	F	0-59%

The assessment reporting will be maintained through comprehensive quarterly cumulative report cards every nine weeks and anecdotal progress reports compiled throughout the school year.

Montessori Assessment and Philosophy

Teacher Observations

Dr. Montessori believed that observation/research was the most valuable evaluation tool for evaluating a student’s placement and progress. Dr. Montessori applied her medical knowledge of observation as a doctor to scientifically observe the behavior of children. She then used her observation data to develop an education method that taught teachers how to “scientifically” observe their students and how to “scientifically and accurately” record their observations. In essence, Dr. Montessori’s observation method was incorporated into the philosophy, method and her teacher training. Through careful and thoughtful observation, the teacher can determine a student’s progress and guide/direct the student appropriately.

Montessori’s consideration of “Mastery of Material” is generally set at 100% (or total completion) of objective completed. If a child does not achieve total mastery/completion of an objective, the child is redirected to and through the appropriate preparatory materials so they can achieve the mastery level of the specific lesson/work.

As children get older, and are subject to additional types of assessment (including teacher-generated quizzes/exams), “Mastery” is viewed to be at least at the 80% level. Any score below 80% indicates the need for redirection to and through the appropriate materials in order to reach achievement of that “minimum” mastery level.

Student Assessment

A core tenet of the Montessori philosophy includes the teachers' daily comprehensive observation. These observations go beyond work choices and performance. The Montessori teacher records the student's

1. ability to choose work independently,
2. the level of coordination with which the student is able to complete the task,
3. the order with which the task is undertaken, and the
4. child's level of concentration present while performing the work.

Specific attention is given to the child's repetition of any work, which gives insight into the child's confidence with and understanding of the specific concepts that he is experiencing.

At the Primary level (K-6) direct observation is systematically recorded to note the child's strengths and weaknesses in specific skill areas and is used as a continuous measure of student progress. The following forms of observational assessments are used in the Montessori environment at the Primary level.

- **Specimen Records**

These are the fullest accounts of a child's behavior and are obtained when the Teacher follows a single child for a period of time, recording everything that happens to the child and everything the child does. This form of observational assessment provides the teacher a picture of the child's ability to manage time and motivation. Teachers keep detailed records for each child to ensure students are mastering all the necessary skills and staying on track

- **Written Progress Reports**

Written progress reports to parents are effective for highlighting conference content. Twice a year, in January and May, as each semester comes to an end, the Teacher prepares a written narrative evaluation of the student's work, social development, and mastery of fundamental skills.

- **Portfolio Sequence of Research and Group Activities**

Three times a year, in November, February, and May, students and teachers will go through the students' completed work and make selections for their portfolios.

- Assessment/ Purpose of assessment:

1. To measure how effective a teaching method is used to determine progress of individual students
2. Used to stimulate the students mentally by appealing to their natural love of learning instead of encouraging learning through *grades*, rewards and punishments.
3. Use portfolios, projects, research, and presentations to test student's knowledge and progress. This:
 1. Avoids surface knowledge (memorized times tables, but does not that x is multiple addition or skip counting), rote memorization (learning by repetition-not understanding)

2. meaningless “busywork”(to work at something for the sake of work, not for the sake of learning), and
 3. isolated facts (facts related only by the alphabetically order in which it is placed)
- Emphasizes critical analysis, self-guided research, independent discovery, and assimilation of ideas, hands-on work and problem solving. (all these processes are part of the scientific process of discovery –research- collection of data- evaluation of the data- clinical observation, and use of data to evaluate (problem solve) and prescribe the direction in which to go.

Intervention

Our teachers evaluate and provide feedback for student progress using a variety of assessment methods that value both content and process of academic achievement as described above. The emphasis in assessment is to ensure that students have ample opportunity to demonstrate what they know and are able to do.

Report Cards

Teachers provide written report cards four (4) times a year, mid-term progress reports, and schedule parent conferences semi-annually. Through the ongoing assessment procedures, teachers should know which children, if any are not satisfactorily mastering the basic content and process skills they need to proceed successfully into the next school year. For these children a conference is held with the parents and the child to devise a homework program to both supplement standard curriculum, and provide additional support and practice.

Reporting

The school will use the Student Teacher Accountability Reporting System (S.T.A.R.S.) of reporting to the state. This method will also be used to report to the local school district.

- Successful completion of this individually designed program enables the child to be adequately prepared to enter the next grade level.
- The founders of the school recognize that a charter school needs to be flexible in the face of changing or unexpected student needs.
- Part of the design and intent of our school is to create an atmosphere (school climate) that promotes innovation and flexibility.

Individual Student Failure:

Parents, teachers, administration and support may call for a review of the student’s progress at anytime. The student’s Personal Education Plan (PEP) may be reviewed, reinforced, re-emphasized or modified during this meeting by:

- a) A plan will be created that will detail the corrective plan of action that student, staff and parents going to take.
- b) The plan will be evaluated at every individual instruction period to judge its effectiveness and the adherence of its participants.
- c) If the plan is found ineffective, then the educational team is empowered to explore and implement changes in educational program that may include: Outplacement, additional

educational modifications, bringing in contract services or implementation of a different curriculum.

Curricular Failure (in a particular subject area)

- a) The data indicating the failure will be analyzed to determine particular curricular shortcomings.
- b) An appropriate pretest and posttest will be created to enable the educational team to measure progress.
- c) Curricular changes will be made using documented “best practices” as deemed appropriate by the educational team.
- d) The pretest will be given and the changes implemented.
- e) After an appropriate period of time, the posttest will be given and evaluated relative to the pretest.
- f) Adjustments to the curriculum will be made if necessary to achieve maximum student outcomes.
- g) The curricular area will be re-evaluated at each individual instruction period in the same method and modified as needed.

Remediation Plan Timeline K-6

A description of the charter school’s plan for evaluating student performance, the types of assessments that will be used to measure student progress toward achievement of the state’s standards and the school’s student performance standards, the time line for achievement of the standards and the procedures for taking corrective action in the event that student performance falls below the standards;

Specific remediation plan (for students not achieving standards), including a timeline for implementation of the remediation plan.

- a) Monthly (or more frequent) individual meetings will occur to ensure proactive response to meeting standards. The longest a student would need to wait, therefore, to modify a personal education plan (PEP) is one month.
- b) The students will be evaluated yearly using standardized and validated tests that are appropriate for the child’s developmental level and abilities. The data from these tests will be evaluated and students not meeting State, Federal, or SCS Standards will automatically be given a PEP. Criterion referenced standardized tests will be implement as they are identified and correlated with NM Standards and Benchmarks.
- c) Student portfolios will be maintained and reviewed yearly. Growth will be noted and documented in the child’s school record. This data will also be utilized in developing, evaluating or modifying PEPs.
- d) Academic progress will be documented in teacher records of student mastery, meetings and student interactions. This data will also be utilized in developing, evaluating or modifying the student’s PEP or IEP.
- e) Activities, teacher observations, portfolios, small group work, mini-books and graphic organizers demonstrating satisfactory rubric scores, familiarity with (F) or mastery of (M) state and school performance standards will constantly be tracked. State standards will be correlated to activities on the spreadsheet allowing teachers to record progress in one location.

- f) Frequent individual meetings will ensure any student off track for meeting state or school standards will not go unnoticed.
- g) Pre and Post Testing/ Additional Measuring (restated)

Assessment

1. Students take annual N.M. achievement tests to evaluate their yearly progress. Additionally, daily, weekly and monthly progress is evaluated by pre and post testing of students as they move through curriculum areas as required for each grade
2. The pre and post testing occurs within the framework of the Montessori 3-part lesson format described below. Lesson is presented to the student. Student repeats the lesson and then continues to solve other problems with the same method. (Montessori equipment / materials are especially designed to help students “discover” the answer within the work itself).
3. Students check own work with teacher supervision and direction. In the beginning of the year, each student is pre-tested for placement in each curriculum area. Pre-testing also continues throughout the year for each new concept presented. Post-testing is the 3rd step of each Montessori lesson/work. Post-testing is for evaluation of student understanding.
4. Ideal outcomes of this format:
 - Students show mastery of the work.
 - Students create their own additional problems to solve.
 - Students help and work with other students.
 - Students participate as evaluators of their own progress.
 - Students participate in setting their goals.

Additional Testing: Supplemental traditional materials and texts throughout the core curriculum provide students daily and weekly opportunities for evaluating student progress. Comprehension of information is rated by percentage through these traditional means.

V.D.2. Plan for evaluating Student Performance continued: level III 7th-12th grade

A specific remediation plan for students not achieving standards will include a timeline and process for parent notification and for implementation of the remediation plan.

In the event that a student at SCS is not making adequate progress or achieving standards in the timeframe set out by the school, remediation and academic improvement plans will be created. For 7th grade students who are nearing proficiency, and 8th - 12th grade students who have less than a 75% in any class at the 4½-week time period (mid-quarter), a referral will be made to the Student Assistance Team(SAT). A meeting will be scheduled to include the parents, the student and SAT. Parents will initially be notified by letter with a phone or e-mail follow-up. Subsequent notification of meetings concerning the student will be in the form the parent prefers, but the school will record documentation of the notice. Together this group will develop an Academic Improvement Plan (AIP).

The student’s ongoing assessment will help the team to:

- Establish baselines of the student’s academic background
- Measure ongoing progress
- Determine the relevance of educational goals and make adjustments as needed

The team will look at the student's New Mexico Standards Based Assessment data, formative and summative assessments, criterion-referenced tests, portfolios and projects, teacher observations, and other authentic documentation of mastery. The team will then develop an improvement plan to include the following:

1. A description of academic deficiencies
2. Academic expectations
3. Remediation strategies such as tutoring, daily progress reports, computer-based tutorials, small group instruction
4. Timeline of strategy implementation
5. Measurement and assessment tools to verify achievement of expectations
6. Post-remediation plan for monitoring
7. Responsibilities of the parties attending the meeting
8. Responsibilities of each party and the actual Academic Improvement Plan will be recorded on the plan:

Academic Improvement Plan Responsibilities (Plan Format)

- Student Name
- Grade Teacher(s)
- Goals
- Target Date (for mastery)
- Student Responsibilities: a. b. c.
- Parent Responsibilities/Provisions: 1. 2.3.
- School/Teacher/Administrator Responsibilities/Provisions: 1. 2.3.
- Signatures:
- Student Date
- Parent Date
- Teacher Date
- School Representative & Date

Academic Improvement Plan (AIP) will include:

- Student & Date
- Parties present
- A description of academic deficiencies (in which content area(s) and why -- missed assignments, poor performance etc.)
- Academic expectations:
- Remediation Strategies Individualized instruction; Computer-based tutorials; small group; digitized media etc.
- Who provides academic support Teacher, advisor, outside tutor etc.
- When academic support occurs Before school, during school day, lunchtime, after school
- Measurement/assessment to verify achievement
- Teacher-designed classroom assessments,
- classroom grade,
- observation,
- attendance at support sessions,

- completion of coursework & homework

Student progress will be reviewed every other week by Student Assistance Team (SAT). As part of the mission of SAT, the school feels that it is vital for students to fully understand the concept of cause and effect, their role in the current situation, and how to remedy it. Students can “opt” to make a change or “opt” out. Students who are in danger of failing or not meeting state standards may not progress with their peer group to the next grade. Students at SCS will only progress to the next grade when they have met all standards at the present grade level. Progress will be monitored until such time that the student shows mastery of the content by reaching proficiency in a given standard (7th grade) or maintains a grade of 75% or higher over a six week period (8th through 12th grade). At that point, progress will be monitored every month for the remainder of the first semester or the end of the school year. As often as the team meets, parents will be notified at the same time period of their student’s progress. At any time, parent input will be welcomed and sought by the SAT and school.

In accordance with State Statute 22.2.8.6 (Educational content standards; remediation programs; promotion policies; restrictions), SCS will follow the School Assistance Team (SAT) process to identify and support students who are experiencing difficulties that prevent them from benefiting from their current educational program. This process is in compliance with state and federal mandates and follows the New Mexico State PED Handbook. Teachers and support personnel will be trained each year in this process. The basis for this plan is a three-tiered model of intervention which provides for intervention and support at three distinct levels for students within our learning environment.

TIER I – GENERAL SCREENING

Students on a school-wide level will be screened using formative assessments in reading and math. A Home Language Survey will be used to determine whether or not a child should be screened for English Proficiency. Information will be collected regarding general health and well-being, and screenings for vision, hearing, and speech and language will be conducted for all students in grades six and nine, and on an “as needed” basis for all other students.

Those students who are having problems achieving at grade level or having behavioral difficulties may be referred to SAT. This team assists the teacher and student in the classroom by conducting a screening and identifying possible supports and interventions for success. Initial assistance will first be addressed at the classroom level through behavioral cues or instructional methods.

As part of the general application process for SCS, all incoming students will take a math and reading-screening test to determine their academic levels in these subject areas. Correct placement is considered an appropriate proactive intervention. Short-cycle assessment and all state mandated achievement tests that may also be used to assess the student’s academic progress. Other support services such as Bilingual Education, Title I, Indian Education, community agencies, and counseling can be considered in order to help the student be successful.

SAT then meets with the student, parents, and teachers to develop the AIP that will identify specific areas of need(s) for the student, what types of intervention and support will be given, who will implement and document outcomes, the criteria for success, and how that will be evaluated. Students who require further interventions or are not achieving within the AIP will be referred to the Student Assistance Team (SAT).

TIER II – THE CHILD STUDY PROCESS STUDENT ASSISTANCE TEAM:

SCS will utilize the New Mexico Public Education Department Technical Assistance Manual: Student Assistance Team, for student intervention. The team is composed of multidisciplinary staff members who include but are not limited to general education teachers, special education staff, paraprofessionals, nursing or health staff, and mental health staff. Parents play an integral role in the SAT process and must be a part of this team.

Information and details of underlying elements and factors are examined as they impact the student's learning. The culture of a student - ethnicity, language, gender, and socioeconomic background, has an important impact on that student's learning style, motivation, and aspirations. The team will take these issues into account when considering influences on the student's learning and behavior at school. The SAT will identify those aspects of the student's culture that may enhance his or her learning.

Pre-referral strategies and interventions from the AIP are reviewed and revised as needed. A plan is then devised to support the student that will include a timeline for following progress. The state handbook recommends nine to eighteen weeks to allow interventions to take effect, but this will vary according to circumstances. SCS is dedicated to creating individualized interventions that use the student's strengths and talents in the process. If, after the designated time period of no sooner than 9 weeks and no later than 18 weeks, interventions are deemed not effective by SAT and the parents, the student is referred for a Multidisciplinary Evaluation, Section 504, Title I or other programs.

The SAT team will document all communications, meetings, decisions, plans and follow-up procedures. A record of phone calls and e-mail correspondence will be kept in a log. Designated PED forms will be used to notify team members of a meeting, to obtain parental consent, and to document meetings and progress.

TIER III – MULTIDISCIPLINARY EVALUATION PROCESS

If the Tier 2 interventions are not successful in addressing the student's needs, the student may be referred for evaluation to determine eligibility and possible need for special education and related services. A referral of this type should only be made in cases where there is a crisis, obvious evidence of exceptionality, or when interventions have not been successful over a period of time for the student.

If a student is found not eligible for Special Education or related services, they are referred back to SAT where an Intervention Plan will be developed in order to support the student in the learning environment. Recommendations and strategies from the Multidisciplinary Evaluation will be integrated into the Intervention Plan.

If a student is found eligible for Special Education and/or related services, an Individual Education Program (IEP) will be developed and implemented in an expedient manner. (Refer to the State PED SAT manual for more detailed information) Assessment in addition to the statewide mandated testing (that will be used to measure student progress toward achievement of the state's standards and the school's student performance standards).

1. SCS will hold high academic standards for its students with ongoing improvement as the goal for all. Improvement occurs through utilizing assessment data in a constructive and proactive manner that addresses the needs of the students and staff.

2. In order to effectively utilize assessment data to generate a large picture, multiple assessment techniques must be implemented.
3. An accurate account of the success of can only occur through varied assessments that address the strengths and weaknesses of all students.
4. As Montessori is the primary instructional approach of SCS Montessori assessment tools will be an integral part of the school's assessment picture, and as such, will ensure student, and ultimately, school success.

Primary Purposes for Assessment Data

- Students establish skill set
- Determine student strengths
- Determine student weaknesses
- Measure student growth over time
- Measure standards acquisition
- Determine Adequate Yearly Progress status
- Determine curriculum effectiveness
- Provide impetus for ongoing improvement
- Ensure SCS is meeting its stated mission

Forms of Assessment and Examples

- Ongoing Assessment - To monitor quality of work, social skills, and self-confidence
- Process portfolios
- Projects
- Performance Assessment
- Role playing to improve group dynamics
- Mini-lessons
- Small group exercises / peer editing
- Peer and teacher feedback

Summative or Formal Assessment -To measure cumulative comprehension

- Process Portfolios
- Quizzes / cumulative tests
- Standards-based assessment
- Norm referenced assessment
- Criterion referenced assessment
- Reading comprehension assessment

Social-Emotional Assessment - A student who is disruptive and/or unsuccessful requires individual assessment (see specific Remediation Plan)

- Reading level assessment
- Home Language/English Proficiency assessment
- Special education testing
- Reading level adjustments
- Simplified language on rubrics and peer evaluation checklists
- Behavior contract for group work

Montessori Model Assessment

Curriculum Assessment - The principles of the Montessori model will guide ongoing and formative assessment. In a Montessori classroom, assessment occurs in a cyclical process and provides ongoing feedback. The teaching-assessment cycle includes the following steps:

- Identify their curricular goals
- Diagnose their status relative to those goals
- Plan strategies to achieve those goals
- Measure progress along the way
- Each step of the teaching-assessment cycle is followed within each instructional component throughout the assessment process.

Assessment of Montessori components

- Didactic Instruction Assessment
- Discussing goal and objectives
- Identify student status in relation to factual knowledge (conversation, multiple-choice test, project design assignment)
- Progressing toward goals and objectives (handouts, overheads, outlines, advanced organizers, thinking maps)
- Measuring the results (multiple choice/short answer tests, fill in the blank quizzes)

Coached Project Assessment

- Determining the goals of a coached project (checklists, timelines, calendars, rubrics)
- Identifying student status in relation to the skills of the coached project (skills list)
- Progressing toward the goals and objectives (consensus building, responsibility, effort, follow-through, attention to detail, timeliness)

Measuring progress in the coached project by means of narratives, rubrics, oral and written reports, performance, portfolios, self-assessment, peer assessment

Seminar Assessment -Determining the goals of the seminar-and experience dependent by means of text referencing, critical thinking, questioning

Identifying student status in relation to the goal by means pre-seminar activity, speaking, listening, thinking, teacher observation, student question creation

Progressing toward the goals of the seminar by means seminar behavior, model video, checklists, rubrics, ongoing growth

Measuring the progress of seminars by means of self-assessment, peer feedback, extension of ideas, further discussion, research

Summative Assessments

Standards Based Entrance Exam - a standards aligned online assessment such as Northwest Evaluation Association's MAP will be utilized to determine each student's level of standards proficiency upon admittance to SCS.

Reading Comprehension Assessment - When deemed necessary, a reading and vocabulary comprehension assessment, such as the Gates MacGinitie test, may be administered.

PLAN

1. All ninth grade students will take the pre-ACT exam PSAT
2. All tenth grade students will take the pre-SAT exam
3. State Mandated Testing - The Standards Based Assessment (SBA) will be administered to all 6th, 7th, 8th, 9th, and 11th grade students.
4. The New Mexico High School Competency Examination (NMHSCE) will be administered to all 10th graders.
5. Optional Assessments - In preparation for college, 11th and 12th grade students will be encouraged to take the ACT, SAT, and Advanced
6. Placement Exams.
7. Student Grading

All students will receive progress reports mid-way through each grading quarter (4 1/2 weeks). 7th grade students not making adequate progress, and 8th through 12th grade students earning below a 75% in a class at this time, will be referred to SAT for a remediation plan. Standards based report cards will be generated every nine weeks for each 6th and 7th grade student. These report cards will be detailed accounts of each student's progress toward grade level proficiency. During the 8th grade year, students will begin earning grades in conjunction with detailed standardized reporting.

From 9th grade through 12th grade, SCS students will be graded using a 4.0 scale, where A-4, B-3, C-2, D-1, and F-0. Advanced coursework may be weighted differently. Teachers will supplement grades with content standards acquisition information to indicate the level of proficiency and its correlation with a letter grade. Upper grade level report cards will include a narrative detailing the student's progress toward standards acquisition and other pertinent information. Cumulative Grade Point Averages (GPA's) will be kept on file in the school administrator's office for each student. Student report cards will be sent home and parents will have access to student grades through an online grading system such as PowerSchool.

Plan for documentation and reporting of student data (School Report Card, STARS, and UCA).

SCS will document and report to the New Mexico Public Education Department data required in the state mandated Annual School Report Card. Data will be disaggregated by subgroups required by No Child Left Behind federal legislation. The annual data provided in the Annual School Report Card will include:

- Student achievement on state mandated assessments
- Graduation rates
- School safety-criminal incidents
- Dropout rates
- Attendance
- Parent and community communication and involvement
- School climate survey results

Additionally, student performance will be reported to families through regular communications from student's advisor, including telephone calls, progress reports, e-mails and conferences, and report cards. The SCS Governing Board in conjunction with the administration will set policy with regard to reporting student and school performance. The

policy will stipulate which indicators will be highlighted (in addition to the NMSDE required data) and how often results will be communicated to the school's stakeholders. At a minimum the school will produce an annual performance report. SCS will submit any required reports through the PED STARS reporting system.

Timeline for achievement of the standards

School Requirements

SCS expects to meet or exceed state performance standards outlined by the New Mexico Secretary of Education during the five-year term of the charter. It is the intention of the school to do so upon completion of its second year of operation. The timeline for meeting state achievement standards is as follows:

- Year one of operation: Collect baseline data
- Years two through five: Demonstrate adequate yearly progress as defined by the NM Public Education Department

Student Requirements

The students of SCS will be expected to meet grade level standards within one academic year. A student will not advance to the next grade level standard until proficiency has been reached. If intervention is necessary to support the student, a remediation plan will be developed (see Remediation Plan).

V.E. SPECIAL POPULATIONS

Meeting Student Needs

SCS provides an education to all students based on the Montessori philosophy, curriculum and materials appropriate for each developmental level of learning. Montessori's curriculum is designed to meet the individual need of all students.

A large percentage of the Montessori methods and materials are consistent with strategies, techniques and materials which have been recommended for students with special needs; special needs being defined in this document as "at-risk", "bilingual", "Limited English Proficient (LEP)", and "special education" students.

SCS will work with the guidance of NMPED and the local school districts to identify the special needs of our students and create Individual Education Program's (IEP) to meet all applicable state and federal requirements, including the Individuals With Disabilities Education Act (IDEA) and Section 504 of the Rehabilitation Act of 1973.

- Individual plans for students of Limited English Proficiency will be consistent with state and federal guidelines.
- In case of extreme impairment or disability whereby the student cannot be served appropriately at the School, SCS will "contract out" for services with the local school district or other available services. The following is a list of services that will be provided to serve the needs of the exceptional student population:
- Academic pullout- since all students will be mainstreamed into regular education classes, those Exceptional Student Education (ESE) students who require extra attention will be given appropriate tutoring by a certified ESE teacher. The amount of time will be determined by their IEP, as will the specific skill and content area to be remedied.

- Consultation and collaboration will be provided for those students, who can succeed without the assistance of pullout, but need extensive monitoring.
- Speech Therapy- a speech therapist will either be on staff, or contracted out depending on the number of students requiring speech therapy, as per their IEP.
- Physical therapy and occupational therapy will be contracted out.
- Enriched Curriculum for gifted students- the depth and breadth as well as the individualized nature of the Montessori curriculum ensures that the needs of gifted children will be met. SCS will staff an ESE specialist. The following is a job description for the ESE specialist:
- Orientation for ESE parents and students before school begins. This would deal with the nature of different disabilities, connections between being ESE and having discipline problems, (explaining to the parents that ESE students have a different set of rules that must be followed when suspending them), frustration of students with disabilities, and orientation of school's ESE program. A similar orientation for staff and community faculty will be provided during in service before school starts.
- Weekly consultations with teachers. This would ensure that appropriate modifications are occurring during instructional activities, as well as to ensure that the teachers are providing the appropriate test modifications.
- Administer screenings of those students who have consistent difficulties and are referred by teachers, and who have proper consent from their parents. This will then be followed up with the School Board's Psychologist.
- Work closely with the guidance counselor to assure that ESE students are scheduled correctly.
- Administer reevaluations as per three-year regulations.
- Provide a tutoring schedule.
- Conduct special tutoring sessions, as well as groups for students to deal with issues such as "study skills designed for the disabled by using their learning style strengths" and "frustration in the classroom."
- Work together with the data processor to ensure that all dates in the system are correct and, therefore, ensure that we get the correct funding for our ESE students.
- For the English Speaker of Other Languages (ESOL) and Limited English Proficient (LEP), we will offer an ESOL class designed to meet their needs. An ESOL certified on staff member will take care of the administrative aspect of the program, as well as test the eligibility of appropriate students. We will follow the NMPED's guidelines regarding LEP.

In Appendix J, the Joyce Pickering article explains the Montessori approach and how it benefits At-Risk children. This article also addresses Alternative Language Services and English Language Learners. If required, SCS will hire additional supplemental specialists who can work specifically with the unique needs of each child.

Some of these teaching methods include:

- Differentiated instruction
- Peer Teaching
- Hands on educational program
- Visual, auditory, kinesthetic and tactile learning
- Music, art and movement which provide opportunities for multiple intelligences and different learning styles
- Focus on individual strengths

Procedure:

1. Students receive continual positive support while acquiring, maintaining and mastering skills. SCS plans to make further accommodations and/or modifications for individual students according to specific needs.
2. Students will be assessed through the use of standardized instruments. A pre and post-test will be administered to all students. Gain scores will be used to show individual student improvement
3. SCS views assessment as the process of measuring a student's progress toward a goal. Each student's personalized education plan will serve as the foundation from which to measure student outcomes.
4. Outcomes will be congruent with N.M. State Standards, which identify what New Mexico public school students should know and be able to do. Students are expected to perform at the end of each grade level as outlined in the benchmarks of the N.M. State Standards and as specified in each learner's Personal Education Plan (PEP).
5. At the end of each evaluation period, students and parents will receive a written report from the faculty, which will include specific information on the student's progress in achieving the individual learning goals. This report may be based upon the student's portfolio or work, documented observations by the faculty, formal testing, student's self-evaluation or other student products.

Methods used to identify student educational strengths and needs and the extent to which educational goals and performance standards are being met.

Montessori Assessment Philosophy

- Montessori's consideration of "Mastery" of material is generally set at 100% (or total completion) of objective completed. If a child does not achieve total mastery / completion of an objective, the child is redirected to and through the appropriate preparatory materials so they can achieve the mastery level of the specific objective.
- As children get older and are also subject to additional types of assessment including teacher-generated quizzes/exams, then "Mastery" is viewed to be at least at the 80% -85%
- Any score below 80% indicates need for redirection to and through the appropriate materials in order to reach achievement of that "minimum" mastery level.

Competency and Mastery Criteria

Movement through SCS is based on demonstrated mastery of clearly stated curriculum standards. Mastery of basic essential skills and alignment of the Montessori curriculum with the State Standards has been developed by Montessori Made Manageable, Inc.

Note: Throughout this application, grades are mentioned in relationship to Montessori levels. The word grade represents a one-year portion of time for a specific age of child. The word level means a grouping of ages and grades into a developmental level containing basically three grade levels.

SCS' philosophy is that learning is developmental and all individuals may develop in different ways and at different rates. Movement through the SCS will be paced by ability and motivation rather than by age or perceived grade level. Children will be organized into natural multi-age groups rather than isolated grade levels. The growth and development of each learner will be continually tracked and monitored through one or more of the following:

- A Checklist of Mastery Criteria;
- Weekly-Daily Lesson Plan;
- Learning Activity Packets
- Portfolios
- Attendance Records, and
- "Attributes of the Learner" Profile.
- Required N.M. State Testing

In the spring the required state tests will be administered to all students in grades 3, 5, 8, in reading, writing and mathematics. Plus, adding a test in science when the State Board of Education adds it.

- Norm-Referenced Test / all students annually.

Written progress reports to parents are effective for highlighting conference content. Twice a year, in January and May, as each semester comes to an end, the Teacher prepares a written narrative evaluation of the student's work, social development, and mastery of fundamental skills.

Portfolio sequence of research and group activities Three times a year, in November, February, and May, students and teachers will go through the students' completed work and make selections for their portfolios.

Critical indicators inventory for Attributes of the Learner Profile Student assessment

A core tenet of the Montessori philosophy includes daily comprehensive observation. These observations go beyond work choices and performance. The Montessori Teacher records the student's ability to choose work independently, the level of coordination with which the student is able to complete the task, the order with which the task is undertaken, and the child's level of concentration present while performing the work. Specific attention is given to the child's repetition of any work, which gives insight into the child's confidence with and understanding of the specific concepts that he is experiencing.

At the primary level, direct observation is systematically recorded to note the child's strengths and weaknesses in specific skill areas and is used as a continuous measure of student progress. The following forms of observational assessments are used in the Montessori environment.

Specimen Records - These are the fullest accounts of a child's behavior and are obtained when the Teacher follows a single child for a period of time, recording everything that happens to the child and everything the child does. This form of observational assessment provides a accurate record of the child's time management.

Attendance Outcomes

SCS is committed to ensuring at least 95% attendance rates of its students. Montessori schools consistently show high student attendance rates. Parent involvement is an essential ingredient of the school. Open communication, as well as volunteer hours on the Board of Directors, advisory committees, and fund raising events facilitates a sense of community. Recent research confirms a positive correlation between parent participation in school activities and student attendance and achievement.

Evaluating Student Performance/Purpose of assessment

determine progress of individual students and guide appropriately stimulate students mentally by appealing to their natural love of learning as instead of encouraging learning through grades, rewards and punishments.

Assessment Practice

Teacher keep detailed records for each child to ensure he/she is mastering all the necessary skills and staying on track

Use portfolios, projects, research, and presentations to test student's knowledge and progress. This avoids surface knowledge, rote memorization, meaningless "busywork", and isolated facts. Emphasizes critical analysis, self-guided research, independent discovery, and assimilation of ideas, hands-on work and problem solving.

Tracking and Record Keeping As part of the Montessori Certification all teachers are thoroughly prepared in daily assignment and tracking procedures.

SCS will, at a minimum, administers all state required tests. We may also use another instruments in the first few weeks of the school term to determine students' baseline achievement and educational strengths and needs. At the end of the year, students will be given other test. The goal is for students to advance at a rate comparable to or above other N.M. State students.

Other methods used will include, in addition to the required standardized testing, but not be limited to, performance assessments (oral presentations and demonstrations), product assessments (science projects, art exhibits, design projects, and portfolios) and process-focused assessments (interviewing, work plans, and observations).

There will be two mandatory parent/teacher/student (as applicable) conferences to determine future goals. The first conference will be held before the beginning of the school year in order to review student and parent contracts and set initial goals. The second conference will be held at the beginning of the second semester to review progress accomplished during the first semester and then to set goals for the remainder of the year.

Portfolios will be presented to parents as part of the midyear conference and will be taken

home at the end of the school year. Parents or teachers can request conferences at any other time.

Narrative evaluations combined with competency checklists and goal-setting conferences will become part of the final performance report summary for each year. All parent and student contracts, written performance evaluations, achievement test scores, and conference summaries will be placed into the student's permanent folder.

Students are continuously assessed by the teacher in order to determine their readiness to advance in the curriculum. The materials themselves are devised with a "control of error" in which the children discover and correct errors, on their own, independent of adult intervention. Knowledge of the materials and whether or not a student can teach a particular concept to a younger student are also important diagnostic and assessment tools.

How students, at a minimum, participate in the statewide assessment program

- SCS will be accountable for student achievement on all standardized tests that are mandated by the State of New Mexico.
- Faculty will plan, with representatives of the district, the alignment of testing with that planned for the district's schools, which will include all required N.M. state testing.
- As the NMPED develops new assessment tests driven by the benchmarks in the N.M. State Standards, the faculty will work with the NMPED and the local school district on the implementation of these assessments.
- At the beginning of the kindergarten level, the standard district kindergarten readiness test will be administered.

Suggested Modifications to Meet Individual Student Needs, Including Bilingual, Limited English Proficient and Special Education Students

SCS hires teachers who are specifically certified in these special areas on an as need basis. The specialists assist specific children according to the requirements of their IEPs. Modifications include but not are limited to the following components and examples. These examples are suggested modifications, which SCS utilizes to support student learning according to the student's needs. Staff with a Teachers of English to Speakers of Other Languages (TESOL) endorsement is hired to provide English as a Second Language (ESL) services. When needed, modifications to instruction and assessment for student with exceptionalities are included in their IEPs via:

1. Modifications in the Environment

Establish daily routines, Reduce visual distractions, Provide adequate ventilation and lighting, Limit oral distractions, Seat students according to need (e.g. attention, vision hearing, behaviors), Use workspace other than student's desk

2. Modifications in Pace

Reduce or substitute assignments ,vary activities, allow breaks, allow additional time for students to preview materials, complete tasks and review, minimize copying and recopying tasks

3. Modify Materials

Fold paper for students who have spatial or organizational needs, Utilize different types of paper (i.e., sandpaper letters), Use grip on pens for students with handwriting problems Use highlighting or color-coding, Reading written questions aloud, Use tape recorders for lessons or assignments, Reduce the amount of material on a page, Allow students to use a calculator, Outline reading material, Use manipulative or other physical objects, Allow use of a word processor for writing

4. Structure Study Skills

Use peer assistance, use cooperative learning, Provide varied activities for a given Concept, Break down of assignment into smaller units, specialized instruction Establish positive home/school communication.

5. Modification of Instructional Methods

Use concrete objects to demonstrate concepts, no penalty for spelling or handwriting when it is not a subject at the time, provide transitional directions, Provide guided, practice, use large print, use a multi-sensory approach, allow students to dictate responses to a peer or teacher, consideration of learning styles, Simplify directions, paraphrase directions, Provide structure for students to classify information (i.e., outlines, graphic organizers, study guides), Provide information at desk when copying from board is a problem for the student

6. Modifications in Presentation

Give verbal cues, change tone of voice, change question levels, provide mnemonic devices, use hand signals to cue behavior, alter sequence of presentation, ask frequent questions and allow time for response

7. Modifications in Testing

Give oral tests, read test questions, organize tests from easy to hard for different levels. Enlarge or highlight key words on test items, change response format, give multiple-choice questions, and adapt different response methods.

The above are some examples of modifications and/or accommodations are utilized for students with special needs.

Trained personal for special education, bilingual and at-risk students are hired in accordance with state hiring practices and the NCLB guidelines on an as needed basis. These trained personal determine appropriate aides and support according to special needs of the students IEP plan. It is our hope that if a student cannot learn the way we teach, then we will teach the way he learns.

“All students with exceptionalities will be served according to their IEPs.”

E. Special Education Plan

SCS admits students without regard to disabilities or need for special education as required by The Charter School Act. (Section 22-8B-4A, NMSA 1978.) SCS will provide special education services to children with disabilities as required by IDEA 2004, see Sec 6 NMAC 3.2.9.24).

SCS provides special education services by adhering to Special Education Public Laws (i.e., IDEA 2004) and revisions of such laws, implementation of the federal register on special education regulations, state standards, mandates and guidelines and all laws associated with charter school law and special education as stated in the SCS Special Education Manual 2009 edition (Appendix D). SCS also adheres to the SCS’ Governance Policies and Procedures.

SCS provides a free and appropriate education (FAPE) as defined in 34 C.F.R. 300.13.

The SCS Special Education Policy is congruent with both the New Mexico State Public Education Department Special Education Regulations, 6.31.2 NMAC, the Standards for Excellence, 6.30.2 NMAC, Non-Regulatory Guidance IDEA 2004 (issued August 1, 2005), and the federal Individuals with Disabilities Education Act 2004 (IDEA), 20 U.S.C section 1414, the No Child Left Behind Act of 2001, 20 U.S.C. section 6301 et seq., Section 504 of the Rehabilitation Act of 1973, 29 U.S.C. section 794 et seq., and the Family Educational Rights and Privacy Act, 20 U.S.C. section 1232 et seq.

Students will be served in the Least Restrictive Environment (LRE) as determined by the Multidisciplinary Team. Related Services are provided through contracts with private service providers, contracts including regional cooperatives or contracts in conjunction with the local education agency (LEA). All IEPs are conducted in accordance with C.F.R. & 300.340-300.350.

All special education services will be provided in accordance with the Family Education Right and Privacy Act (FERPA). All records will comply with the New Mexico Inspection of Public Records Act.

SCS developed and utilizes their Montessori policy and procedure manual to assist teachers with training and implementation of special education services. The manuals provide information on all required policies and procedures ranging from the pre-referral process, referral process, evaluation procedures, parents’ rights and due process. SCS follows all IDEA and NMPED regulations concerning discipline for students with special needs.

SCS works diligently to provide an atmosphere where all children belong, prosper and learn according to their individual need and become equipped with a “toolbox” of skills, which will prepare them for a productive life.

Access to Other Services but not limited to Counseling or Health

SCS negotiates with local districts or other private providers to provide counseling nurses, and other related services on a contract or consulting basis. School mental health team is composed

of the Principal, Classroom Teacher, and counselor/teacher. The team discusses problem-solving ideas within the classroom context with regard to mental health and other health issues. SCS has a plan to hire a part-time counselor and an on-call nurse to meet specific student needs.

New Mexico Alternate Assessment (NMAA)

NMAA is used as the state mandated test for certain students with IEPs.

Student Assessment

- Students will be assessed through the use of standardized instruments. A pre and post-test will be administered to all students. Gain scores will be used to show individual student improvement.
- SCS views assessment as the process of measuring a student's progress toward a goal. Each student's personalized education plan will serve as the foundation from which to measure student outcomes.
- Outcomes will be congruent with N.M. State Standards, which identify what New Mexico public school students should know and be able to do. Students are expected to perform at the end of each grade level as outlined in the benchmarks of the N.M. State Standards and as specified in each learner's PEP.
- At the end of each evaluation period, students and parents will receive a written report from the faculty, which will include specific information on the student's progress in achieving the individual learning goals. This report may be based upon the student's portfolio or work, documented observations by the faculty, formal testing, student's self-evaluation or other student products.

V1. FINANCIAL PLAN

A. BUDGET

Proposed Budget, Process and Administrative Audit

Pursuant to 22-8-6.1 NMSA, SCS submits to the New Mexico Public Education Department (NMPED) and the Board a balanced school-based budget based upon the projected number of program units generated by SCS and its students, using the at-risk units and the training and experience index of the district. The budget is scheduled to be submitted to the local school district and the NMPED for approval ensuring that sound fiscal practices are followed in its development, and that the budget is within the allotted resources.

SCS adheres to the guidelines of 6.20.2 et seq. NMAC in the preparation, submission, maintenance, and reporting of budgetary information. Approval of the proposed Budget by the SCS Board shall be in a public hearing. The notice of public hearing for the adoption of the budget shall be published in accordance with the Open Meetings Act, Section 10-15-1 et seq. 1978, Public School Code, and the SCS Board policy.

With regard to the current year, SCS is submitting its 2010-2011 preliminary and tentative budget for review with the NMPED on July 1, 2009.

Projected Revenue

SCS projected revenue is the sum of the following categories.

State Equalization Guarantee (SEG)

Pursuant to the 1999 Charter School Act, SCS is to receive 98% of the SEG generated by the program units reflected in the 910B-5. The amount of the equalization revenue is based on the average of the 40, 80, and 120-day enrollment and assumes the current unit value of \$ 3,645.37 for the initial year of operations. SCS projections are based on 180 students. Additionally, the most recent At Risk Units, Training, and Experience Index of the district are factored into the equalization formula once determined.

Activity Fees

Activity fees are not applicable on the initial application, but will be reflected in subsequent academic years

Gifts, Donations- Non Categorical

Revenue for this category is considered as not applicable on the initial application.

Special Development Expenditures (SDE) Funded Instructional Materials

SDE Funded Instructional Materials monies are not considered as applicable on the initial application.

Projected Expenditures:

Salary Budgets

The projected teacher and administrator salaries comply with the educator licensing and salary system outlined in 22-10A-4 NMSA. Budget requests submitted for salary accounts are to be in accordance with the SCS adopted salary schedule. The budget notes the number of employees in each function code as full-time equivalents (FTE's). SCS is not required to use nor comply with any salary schedule norms established by the district.

Non-Salary Budget

Budget requests for non-salary accounts are represented in specific dollar amounts. Estimates for future enrollments are used to extrapolate staffing needs and associated costs such as instructional supplies, equipment, and facility needs. The SCS Board Finance Chair provides any justification of budget amounts that may be required.

Budget Monitoring

SCS furnishes a Budget Status Report to the SCS School Board on a monthly basis showing to-date revenue and expenditures, and the unencumbered balance for review to demonstrate that encumbrances and expenditures are progressing in accordance with the approved budget; as well as a complete picture of the year's financial projection which includes a picture of the complete/total final yearly expenditures in terms which any layperson can understand and thus comment upon.

Budget Changes

During the course of the school year, budget changes, increases, and/or transfers are made as necessary. Increases may result from additional resources, whether or not earmarked.

SCS provides a Budget Adjustment Request (BAR) to the NMPED Budget Office with supporting documentation as needed.

Budget Maintenance Standards

SCS submits budget adjustment requests for the operating budget to the NMPED for budget increases, budget decreases, and transfers between functional categories. Expenditures are not be made until budget authority has been established and approval received from the NMPED. Budget adjustments are not incorporated into the school's accounting system until approval is received from NMPED. Budget Adjustment Requests are prepared on the most recent form prescribed by the NMPED. SCS maintains a log of all BARs by Fund, Function, and Object Code which results in changes to the approved budget. This log is prepared and retained by the school business office for audit purposes.

Annual Audit of the Financial and Administrative Operations

SCS agrees to engage and participate in an annual audit of its financial and administrative operations. SCS also agrees to have all required working papers completed in a timely fashion to ensure the results of the audit to be provided to the NMPED's State Auditor's Office within the statutory time limits required by law. Any and all costs associated with the audit of SCS will be paid by the school.

Proposed Budget	Appendix G. 1-2
910B-5 Appendix	G-1
Proposed 5-year budget	G-2

B. FISCAL MANAGEMENT

Fiscal Management

Specific Plan on how the charter school will manage its fiscal responsibilities in accordance with all federal and state laws including the designation or establishment of the central purchasing office with adoption of state rules or self-developed rules pursuant to State procurement Code.

1. SCS shall establish and maintain good business practices and in all matters comply with all Federal, State, and Local law.
2. State Equalization Guarantee (SEG) and other revenues will flow from the New Mexico Public Education Department (NMPED) through the district to SCS; however, NMPED will retain 2% of the SEG for administrative expenses. SCS will work collaboratively with NMPED to ensure timely reporting and other financial/fiscal processes. In accordance with the 1999 Charter Schools Act, SCS will be held accountable for its fiscal performance.

A revised budget will be prepared and submitted to NMPED, based upon the projected enrollment numbers for SCS student population.

Annual Budget Negotiations

On or before April 15 of each year of the Charter, SCS and the District/State will complete negotiations concerning funding for the ensuing fiscal year.

Special Education

SCS will provide special education services to its students in complete conformance with all State and federal regulations. SCS will be eligible for all federal funds for which it has eligible students, and will apply for funds through the district for all students identified on the 40th day.

Administrative fee

The NMPED charges PEC approved charter schools a 2% administrative fee.

Specific description of the internal control procedures that the charter school will utilize to safeguard assets.

SCS shall practice good business in all matters in compliance with all federal, state, and local laws and regulations. The SCS Governing Board will work closely with the Business Manager and Principal in order to maintain positive financial standing and assure proper allocation of funds.

Internal Controls

SCS will operate in accordance with state and federal laws and regulations relative to fiscal procedures, solvency and responsibility. This will include but not be limited to establishing an internal control system pursuant to N.M. State laws. The internal control structure of the school shall demonstrate that the school identifies applicable laws and regulations, and that its procedures are designed to reasonably ensure that SCS complies with those laws and regulations. Appropriate internal controls shall be made and defined by the SCS Governing Board to safeguard assets, manage cost and expense transactions, promote fiscal efficiency and record, process and report all financial data. The SCS Principal and Business Manager shall be required to implement all internal controls.

Cash Disbursement

Cash disbursement shall require two signatures and shall be required for the following transactions:

1. Invoices received
2. Requests for reimbursements
3. Disbursement of employment not under contract
4. Disbursements for contracts

Approval of Vouchers

The Business Manager may be allowed to approve payment of vouchers to school or district vendors, provided that a summary of those vouchers paid is presented to the SCS Governing Board at its next regular meeting.

Record Reconciliation

All bank accounts shall be verified and reconciled during the monthly closing process by the Business Manager and shall be reviewed by the SCS Board a reasonable time period, as decided by the SCS Governing Board. All discrepancies found during the reconciliation process are researched and corrected at the time they are detected.

Cash Receipts

The Business Manager shall prepare a receipt for all money received. All money is receipted using pre-numbered receipts and shall be deposited in the appropriate bank account within twenty-four hours.

Security of Papers

All check numbers to be issued are to be logged into the school's business software system. Copies of all voided checks, vouchers, purchase orders and requisitions are to be kept in sequential order, on a yearly basis, in the school administrative office.

Separation of Duties

SCS Governing Board shall secure procedures that will ensure a separation of duties in regards to financial management, including payroll processing, cash disbursement, and payment of vouchers or purchase orders. The Business Manager will review all written checks prior to their distribution to add security to the control system.

Property Management and Inventory

The management of SCS property includes ensuring its proper allocation, control, use, and safeguarding. Responsibility for managing SCS property is the sole responsibility of SCS and its personnel. Property granted, given or issued to SCS becomes the property of either SCS or its not-for-profit organization, SCS' Education Foundation. All property will be properly and accurately recorded and those records maintained. Property issued to individuals does not become private property, but remains SCS property. The SCS Governing Board shall define the policy for labeling and/or tagging SCS property. This policy may include:

1. All property will be inventoried on a periodic basis to verify the accurate maintenance of records.
2. All property will be adequately safeguarded and protected to avoid and/or minimize the potential for loss. Any re-location of property shall be noted and kept with the property records.
3. All property will be used economically, and for the intended purpose.
4. All property will be inspected upon arrival and periodically thereafter to ensure it is in good working order.

Audit of Inventory Records

A written inventory of equipment will be kept and be readily available for audit at all times.

Disposal of Property

SCS will conform to statutes and regulations of the State of New Mexico when leasing, selling or otherwise disposing of real property or tangible property including, but not limited to, office equipment, furniture and supplies belonging to SCS.

Signatory Authority for Contractual Agreements

No individual associated with SCS may obligate the SCS Board for the purchase, rental or lease of any tangible property. SCS Governing Board will designate at least two individuals with signatory authority, that is, the Business Manager, the Principal, and/or the Principal's designee. Any purchase, rental or lease in an amount above \$500 will require SCS' Governing Board approval. This amount may be changed by resolution of the SCS Governing Board.

Reporting to SCS Governing Board

The Business Manager shall report monthly to the SCS Governing Board about the budget, including school revenue and expenses to date, private revenue received, etc.

Safe-Keeping Assets

The access to assets will be limited to the Principal or designee by being assigned as the primary custodian at the school, who will be responsible for monitoring access to cash, checks, and other assets.

Plan for Federal Compliance Reporting

Federal Census: School Assistance in Federally Affected Areas

Public Law 81-874 is the Federal Act that authorizes assistance for current expenditures in areas affected by federal activities. Section 2 of the Act directs payment of entitlement to Local Education Agencies (LEA) in whose school district the United States owns certain federal property. Section 3 provides an entitlement to an LEA based on numbers of federally connected children attending the schools of the LEA. SCS shall receive an allocation of such federal funding to the extent it may be available, and only if eligible, under Section 22-8B-13B.

Categories of Federally Connected Children

The Act provides special rules regarding increased entitlements in connection with federally connected handicapped children and children residing on Indian lands.

Twenty Day Counts

SCS will enter, enroll or withdraw students based on the Student Information Systems Manual and will report absences for all Students on a timely basis. SCS will adhere to Student Teacher Accountability Reporting System (S.T.A.R.S.) for the 40, 80, and 120-day counts. The Forty-Day Membership Report is subject to audit by the N.M. State Public Education Department.

Additional summary of description of business procedures to safeguard assets:

SCS Governing Board will present the NMPED a balanced budget consistent with SCS Mission, Goals and Objectives. This budget shall be in the format and on the schedule prescribed by the NMPED. SCS understands that the adoption of the annual District operating budget is the responsibility of the NMPED and agrees to follow the process described herein.

The adoption of the annual SCS operating budget is the responsibility of the Governing Board. The Principal or his/her designee will present to the Board for adoption, a specific budget calendar that meets the deliverable deadlines established by NMPED. NMPED will give SCS the schedule for submitting the budget to SCS' assigned NMPED Budget Analyst, and set a meeting to obtain NMPED budget approval. The budget process will include specific budget

hearings allowing the Board to learn of the public's priorities. The Principal or his/her designee will also be given a specific opportunity to speak to various programs and matters of interest to the Board. Following such hearings, the Board will identify priorities and give general instructions to the Principal or designee to prepare a balanced budget based upon its priorities and other guidelines as deemed appropriate.

Resolution of Differences or Questions

Any items identified in this review by the NMPED Budget Control Agent as requiring modification for any reason will be highlighted for action or/or explanation by SCS. No changes to the SCS budget shall be made by NMPED without the full concurrence of Governing Board of SCS per the *1999 Charter Schools Act*.

After the review and resolution of any differences, the completed budget request will be forwarded to the NMPED Financial Officer according to the instructions. The NMPED Budget Office will consolidate a tentative budget from the returned budget requests and submit it for study and approval. This budget will include SCS budget submission..

The NMPED will document the budget as approved and submit it to the School Budget Planning Unit of the NMPED in accordance with the Manual of Procedure for Uniform Accounting and Budgeting for New Mexico School Districts.

Budget Call

SCS Commodore or designee shall act as the school's Financial Officer for the purpose of responding to the NMPED Budget Call issued by January 31, for the subsequent fiscal year. The Budget Call document will include instructions, personnel listings, and blank forms to report requirements for personnel, supplies, services, travel, and equipment. Budget requests will be completed and submitted to the NMPED Budget Control Agent on the schedule designated by the instructions for review.

SCS Charter School Budget Formulation

SCS will submit a stand-alone site budget as outlined in the NMPED Budget Call Information to the NMPED Budget Office for each assigned cost account. If there are requirements for which cost accounts have not been assigned, the Budget Office will establish additional cost accounts. The NMPED process and accountability for justifying SCS budget submission as

described in the 1999 Charter School Act does not require that the budget be scrutinized nor approved via the normal APS review process. This charter school being approved by the PEC works directly with the NMPED.

Budget Formulation Process

- The Principal or his/her designee will issue a “Budget Call” within SCS as a means for identifying and formulating budget requirements for the upcoming school year and will meet the budget submission deadlines established by the Governing Board and NMPED. This document will include instructions and whatever blank forms, including information for each cost account, may be necessary to compile requirements for personnel, supplies, services, travel, and equipment.
- The Principal or designee will review the individual budget requests, revise them if necessary, and justify budget requirements based on experience factors and instructional programs objectives. Completed budget requests will be compiled and an annual budget within budgetary limitations will be submitted to the Governing Board for study and approval.
- The Principal or his/her designee will document the budget as approved by the Governing Board for submission to the NMPED. This submission will be in accordance with the Manual of Procedure for Uniform Accounting and Budgeting for New Mexico School Districts and any special instructions received from the NMPED.

Salary Budgets

- Budget requests submitted for salary accounts will be submitted with salaries determined by SCS Governing Board per the 1999 Charter Schools Act. The “number of persons” covered will be noted in full-time equivalents (FTE) per the NMPED requirement, however, SCS shall not be required to use nor comply with any salary norms established by APS, only those required by the NMPED. SCS will meet or exceed all minimal salary requirements established by the three-tiered licensure regulations.

Budget for Non-Salary Accounts

Budget requests for non-salary accounts will be in specific dollar amounts. SCS Financial Officer will provide any justification of budget amounts that may be required.

Budget Implementation

For each account approved, within NMPED, Budget Control Agents make individual school allocations and approve expenditures. For purposes of budget implementation at SCS, once the budget allocation has been made by the NMPED, expenditures against that budget shall be approved at the site level.

Specifically: For Salary Cost Accounts SCS will hire and pay employees per school policy. For Non-Salary Cost Accounts, SCS will require administrative approval for all expenditures. He/she will then submit the request to the Business Manager for approval to be made to create a purchase order.

Budget Monitoring

The contracted agency will furnish NMPED the required Quarterly Revenue and Expenditure Reports showing encumbrances and expenditures to date, and the unencumbered balance for review to demonstrate that encumbrances and expenditures are progressing in accordance with the budget plan.

Budget Changes

During the course of the school year it is probable that budget changes, increases, or transfer will be necessary. Increases may result from additional resources, either earmarked or not. SCS will prepare Governing Board approved Budget Adjustment Requests (BARs) with the appropriate documentation or revenue source (e.g., a contract from outside agency) and an appropriate expenditure cost account for new and/or changes in revenue streams and submit them to the NMPED for approval. No changes in revenue or expenditures can be done without the NMPED approved BAR. Any transfers between cost accounts will always be offset to ensure that the SCS budget remains balanced. These changes will be approved at the SCS site per the 1999 Charter Schools Act.

Fiscal Integrity

In the event that the administrator determines additional personnel, programs or initiatives are warranted; no such additions will be made to the budget or spending plan without a corresponding source of funding.

Contracting Process

New Mexico Law and New Mexico Education Regulations will govern the issuance of contracts and purchase orders. Only authorized parties of SCS may initiate procurements. Compliance with applicable procurement laws and regulations shall be the responsibility of SCS Governing Board and periodic internal audits of SCS procurement practices shall be used to ensure compliance. As the chief administrator of SCS, the Principal shall maintain oversight of all procurements and report regularly to the Board on all procurement activities of the school. The Principal or designee shall maintain all procurement records onsite at SCS and shall prepare all necessary reports for the Governing Board to ensure proper tracking of procurement activity.

Purchasing Practices

The 1999 Charter Schools Act gives the Governing Board the authority and right to establish their procurement practices outside those used by the District. As such, SCS will utilize the procurement practices as outlined in the policies and procedures to be developed and by the Interim Governing Board before July 1, 2010. These policies and procedures will meet or exceed all federal, state, and district expectations. The development of these procedures will be done in conjunction with the organization contracted to do the financial management for SCS.

SCS will provide for the fair and equitable treatment of all persons involved in public procurement, to maximize the purchasing value of public funds and to provide safeguards for maintaining a procurement system of quality and integrity. All purchases that expend public school money (including school activity funds) fall under the definition of purchase from public funds and are subject to Chapter 13 Pamphlet 29 NMSA 1978 entitled "Public Purchases and Property" which includes the Procurement Code, Public Works Contracts and other pertinent legislation.

It is understood that grants are not exempt from public purchasing statutes and all applicable state and federal requirements.

SCS will purchase, rent, lease or otherwise acquire all items of tangible personal property, services or construction. All purchases will be strictly in accordance with the laws of the State of New Mexico, federal law and the NMPED regulations. SCS will establish and maintain a manual of purchasing policies and procedures referencing the applicable statutes, and that manual shall be open to the general public..

All procurements for tangible property or services shall be within the budget approved by the Governing Board and shall be reviewed and approved by the Principal or his/her designee prior to their placement. Procurements will be by means of standard purchase orders or letters of agreement as defined by the Governing Board. The Board reserves the right to review, approve or reject any procurement decision.

The purchase, of any tangible personal property or construction that will exceed \$10,000 must be formally bid and may not be artificially divided to circumvent this requirement. Exceptions such as patented or copyrighted products, use of existing contracts, or certain statutory exemptions may apply. Freight, installation, rigging, tax, etc. are considered to be part of the cost of the product. Bid documents will be mailed or otherwise distributed by SCS Governing Board, who shall also publish public notice not less than ten calendar days prior to the date set forth for the opening of the bid.

The purchase, rental and lease of any tangible personal property or construction that will fall between \$3,000 and \$9,999.99 are required by policy to obtain three quotes. These may be written, faxed or telephoned. Documentation including but not limited to the date, time, company, price, person quoting, model number etc., freight charges, must be furnished to the Governing Board who may recommend or contact additional sources. Purchases that are less than \$3,000 must be made at the best obtainable price. Quotes are at the option of the user. Professional services that will exceed \$20,000 must also be formally bid. Guidelines for what qualifies as a professional service and for applicability of the Professional Services Agreement shall be set forth in the Procurement Policies and Procedures Manual that will be developed and approved by the SCS Governing Board prior to the opening of SCS in July 2010. Note that

SCS does pay gross receipts tax on professional services and that a line item for this tax must be specifically established.

Signatory Authority for Contractual Agreements

SCS Governing Board will determine individuals with Signatory Authority for SCS. However, in no instance shall the party initiating the purchase be the same party who acknowledges receipt of that good or service. Nor shall the party acknowledging or recording receipt be the same party who authorizes payment to the provider of that good or service. This separation of accountabilities shall be enforced to protect SCS, in some measure, from any fraudulent use of procurement. Appropriate approval levels commensurate with the nature and dollar thresholds of procurement transactions shall be described in the SCS Procurement Policies and Procedures Manual. These policies and procedures shall meet or exceed the State Procurement Code.

It is expected that any employee of SCS shall have the right to create purchase documents and that person's supervisor must approve the purchase; e.g., the Principal or his/her designee must approve a teacher's purchases. Procurement guidelines will be defined and approved by the Interim Governing Board prior to the opening of SCS in July 2010.

No individual at SCS may obligate the NMPES for the purchase, rental or lease of any tangible personal property, construction or service.

Disbursements Process

Disbursements at SCS shall be made as defined and scheduled by the SCS Governing Board. In no instance shall the party initiating a request for disbursement be the same party who approves that disbursement. Nor shall the party approving the disbursement be the same party who distributes the payment. This separation of accountabilities shall be enforced to protect SCS from any fraudulent disbursement of monies.

Payroll Procedures

SCS Governing Board will collaborate with the contracted Business Manager to determine the schedule and procedures needed for payroll. SCS payroll payments will be made in the manner

defined in SCS policy in accordance with the appropriate separation of duties and approval of payroll time records to ensure that employees of SCS are paid only for services rendered.

Non-Payroll Disbursements

SCS shall be responsible for establishing procedures to ensure the paying all approved and authorized school-related bills in accordance with SCS policy as prescribed in the *1999 Charter Schools Act*.

Property Management

Management of SCS property includes ensuring its proper allocation, control, care, use, and safeguarding. Responsibility for managing SCS property is the obligation of all SCS personnel. These responsibilities include pecuniary liability for loss, damage, or destruction of property resulting from mismanagement, or unauthorized use. SCS personnel responsible for managing property may be relieved of their duties if an unsatisfactory condition is found that is attributable to mismanagement, inefficiency, or other causes within their control. SCS personnel must ensure that equipment is protected, conserved, and maintained. Property issued to individuals does not become private property, but remains SCS property.

SCS property or equipment will be managed in compliance with NMSA 6-20-2:

1. All property will be properly and accurately recorded at the time of acquisition and those records maintained. SCS Governing Board shall define a policy for labeling and/or tagging SCS property defined as any land, buildings, improvements other than buildings, equipment, machinery, construction work in progress, and capital leased assets with a cost of \$1000 or more ... and applies to all assets purchased regardless of funding source.”
2. All property will be inventoried periodically to verify the accuracy of records.
3. All property will be adequately safeguarded and protected to avoid and/or minimize the potential for loss.
4. Any re-location of property shall be noted and kept with the property records.
5. All property will be used economically, and for the intended purpose.

Guidelines for recording and reporting fixed assets are provided in the Policies and Procedures Manual of the Department of Finance and Administration, General Services Department,

Chapter 14, pages 8-9 (issued 2/12/99). SCS Property Management Policies and Procedures shall meet or exceed the guidelines set forth in this manual.

Real Property Acquisition

The purpose of the directive is to establish administrative procedures for the acquisition of real property either by purchase, exchange, donation, lease, or other means.

This administrative procedure applies to all real property acquired by the Governing Board acquired for school, administrative or operational purposes. Real property is defined as the interests, benefits and rights inherent in the ownership of real property. This includes land, permanent buildings and fixtures, site improvements, water rights, access rights, rights of way and leases.

Real Property Disposition

SCS will conform to statutes and regulations of the State of New Mexico when leasing, selling, or otherwise disposing of real property belonging to SCS. In the event that SCS closes, real property shall revert to the NMPED.

Audit of Inventory Records

SCS equipment inventory will be kept and will be available for audit at all times.

Grant Applications and Awards

All SCS grant applications will comply with the policy established by SCS Governing Board.

After approval by the granting agency, SCS will comply with NMPED requirements: Original award letter is received and submitted to the NMPED for processing and signing. NMPED submits completed documents to SCS allowing cost accounts to be established, budget entered, and grantee notified. Spending may now begin.

Specific description of the internal control procedures that the charter school will utilize to provide reliable financial information

Compliance Reporting

Federal Census: School Assistance in Federally-Affected Areas

Public Law 81-874 is the Federal Act that authorizes assistance for current expenditures in areas affected by federal activities. Section 2 of the Act directs payment of an entitlement to Local Education Agencies (LEA) in whose school district the United States owns certain federal

property. Section 3 provides an entitlement to an LEA based on numbers of federally connected children attending the schools of the LEA. SCS will receive this entitlement for all students who attend SCS that fit the criteria.

Categories of Federally-Connected Children

The Act provides special rules regarding increased entitlements in connection with federally connected handicapped children and children residing on Indian lands.

Census Cards

The NMPED/CSD will provide SCS with the needed quantity of pre-printed census cards. Distribution of these census cards will be made one day prior to the 40th school day-the date on which the count must be taken. SCS will receive a letter of instructions with their allotment of census cards as well as sufficient blank forms for recording the data required on children living in federally-sponsored, low-rent housing and the necessary forms for recording the information required on the students residing on Indian lands. The correctly executed census cards or forms must be returned to NMPED/CSD no later than four weeks after the survey date for review.

Twenty Day Counts

SCS will enter, enroll or withdraw students based on the Student Information Systems Manual and will report absences for all students on a timely basis. The NMPED will generate membership reports. The Forty-Day Membership Report is subject to audit by the New Mexico Public Education Department.

Investments

In accordance with N.M. Statute 6.20.2 and Office of Management and Budget (OMB) Circular A-102, all state, federal, or other monies received by SCS will be deposited in SCS' accounts within 24 hours or one banking day of receipt at an authorized banking institution per state regulations. The school shall account for public money placed in interest bearing deposits in accordance with Sections 22-8-40C through (G), NMSA 1978; Section 6-10-17, NMSA 1978; Section 6-10-31, NMSA 1978, and other federal and state laws applicable to the investment of public school money.

As required by law, SCS will take responsibility for acquiring all necessary federal, state, and local tax and employer identification numbers to establish itself as a public school in the state of New Mexico. All bank accounts shall be established to require multiple signatures on checks or other forms of disbursement.

SCS will participate in the Public School Insurance Authority (PSIA) as prescribed by law.

Monthly Account Reconciliation

All bank accounts shall be verified and reconciled during the monthly closing process by the Business Manager and shall be reviewed by the SCS Governing Board within a reasonable time period, as decided by the SCS Governing Board. All discrepancies found during the reconciliation process are researched and corrected at the time they are detected.

Availability of Records

In accordance with the N.M. Charter School Law 22-8B-1 ff, SCS will provide all appropriate financial-related documentation to the NMPED Internal Audit unit upon request.

Specific description of the management and internal control procedures that the charter school will utilize to promote operational efficiency

Financial/Business Operations

SCS will operate in accordance with state law pertaining to fiscal solvency and responsibility. This will include but not be limited to establishing a control system pursuant to N.M. State laws.

Budget Adoption

SCS will adopt a budget in accordance with NMPED policies and procedures and audit systems. NMPED/CSD will receive 2% of funding for administration of the SEG finances. Tuition cannot be charged. Charter schools are responsible for formulating their own budgets in accordance with state audit guidelines. The revenue stream will include: SEG based on the 80, 120 Day Count as appropriate; other State and Federal monies (e.g., state and federal stimulus funds, etc.)

Cash Management Practices

Appropriate cash management practices will be developed and used to ensure that all SCS monies are adequately protected against loss or theft. These practices shall include but not be limited to:

- Monthly reconciliation of all cash accounts, including bank accounts shall be the responsibility of the Business Manager and will be approved by the Principal. Periodic internal audits will be conducted on all cash accounts.
- Separation of accountabilities and duties to ensure fiscal control. The basis of this practice shall be to protect SCS from potential fraud by requiring that no person shall initiate and approve the same transaction in any circumstance.

Accounting basis

SCS financial records shall be maintained using a modified accrual basis of accounting with the capacity to convert financial statements and other financial reports, as needed, to a cash basis.

Specific description of the internal control procedures that the charter school will utilize to ensure compliance with applicable federal and state laws and regulations relative to fiscal procedures**Compliance with Governmental Accounting Standards Board (GASB) 14**

In accordance with GASB, Statement 14, “The Financial Reporting Entity”, (Issued 6/91), SCS will follow the standards defined for a financial reporting entity based on its site-based financial accountability as set forth in the *1999 Charter Schools Act*. This shall apply to all financial reporting to ensure that the nature and significance of SCS’ relationship with NMPED is in no way misleading or incomplete. Appropriate financial records including the NMPED Quarterly Report will be provided in a timely manner to the NMPED Internal Audit Unit.

Compliance with Anti-Donation Clause

In accordance with the Anti-Donation Clause, neither the state nor any county, school district or municipality, except as otherwise provided in the N.M. Constitution (Article IX, Section 14), shall directly or indirectly lend or pledge its credit or make any donation to or in aid of any person, association or public or private corporation.

Use of SCS Facility

SCS will follow NMPED guidelines for facility usage owned or leased by SCS. Use of SCS facilities may be limited to and requested at least 15 days in advance of need:

- Appropriate fees will be assessed for usage based upon state guidelines;
- Permission is based upon certain criteria: (1) on-going, regular school and activity program; (2) school related non-profit group; (3) A non-profit group with IRS affiliation that is recreational or educational in nature; (4) community action groups and recognizable charitable or civic groups; (5) recreational, religious groups; (6) Commercial groups (for profit).

Specific description of the procedures designed to ensure compliance with budgeting and reporting requirements of the NMPED, including the ability to implement the required chart of accounts and to meet all budget submissions and reporting deadlines.

Budgeting and Reporting Requirements of the Public Education Department

SCS will utilize the NMPED required chart of accounts to develop and report all budget transactions. In documenting all financial transactions the most recent function codes and identifying systems will be implemented. SCS will ensure that all financial transactions are tracked using fund, function; object codes and when appropriate program and location codes. An accurate record of funds and expenditures will be kept for all funds received, encumbered and expended.

SCS will establish, with the contracted service provider for business management, a schedule that will enable the district business office to have SCS data required for budget submissions and reports in a manner that will allow them ample time to compile the data as needed.

Financial and Other Record Retention Practices

This schedule describes the most commonly used retention periods. This directive applies only to school records. Retention periods for school security, legal records, business and financial, personnel, library, and transportation records are not covered. Access to confidential documents and/or confidential files will be only by court order, unless provided by statute. Release of confidential documents to law enforcement *and other* governmental agencies will only be upon specific statutory

authorization or court order.

SCS will operate in accordance with state and federal laws and regulations relative to fiscal procedures, solvency and responsibility. This will include but not be limited to establishing an internal control system pursuant to N.M. State laws.

The internal control structure of the school shall demonstrate that the school identifies applicable laws and regulations, and that its procedures are designed to reasonably ensure that SCS complies with those laws and regulations. Appropriate internal controls shall be made and defined by the SCS Governing Board to safeguard assets, manage cost and expense transactions, promote fiscal efficiency and record, process and report all financial data. The School Administrator and the Business Manager shall be required to implement all internal controls.

The term “enrolled” as used in this provision shall be deemed to mean enrolled within the requirements of the School Finance Act and NMPED regulations.

Annual State Equalization Guarantee and other state-allocated revenues will flow through the NMPED to SCS. The amount of funding provided to the Charter School shall be 98% of the school generated program costs and its share of federal and state pass through funding. The NMPED shall retain two percent 2% of the SEG funding.

SCS will adopt a budget in accordance with the statutes of New Mexico and the NMPED policies, procedures and audit systems.

Financial Records Retention Schedule

The following proposed financial records retention schedule is subject to the approval by the SCS Governing Board.

Type of Record	Retention Period
Tax returns and records	Minimum of 7 years from tax or fiscal year end.

Type of Record	Retention Period
Purchase orders and/or contracts	Minimum of 10 years
Payroll and employee records:	Minimum of 7 years from tax or fiscal year end.
<ul style="list-style-type: none"> • Timesheets • Pay stubs • W-2s • W-3s • W-4s • 9419 • 940s • Etc. 	
<ul style="list-style-type: none"> • Bills and invoices • Account statements • Lease payments • Payments on contracts & Pos • Credit card slips • Petty cash transactions/receipts to document all uses of cash 	
Records of all receipts of monies:	Minimum of 7 years from tax or fiscal year end.
<p>Deposit slips Credit card slips</p>	
Bank records:	Minimum of 7 years from tax or fiscal year end.
<ul style="list-style-type: none"> • Bank statements • Bank reconciliation's • Cancelled checks or other check forms indicating payee, amount of disbursement, and date • Electronic funds transfer records 	
Employment contracts	Minimum 20 years
Asset records:	Minimum of 7 years from date of asset disposition
<ul style="list-style-type: none"> • When and how you acquired the 	

Type of Record	Retention Period
<ul style="list-style-type: none"> asset. • Purchase price. • Cost of any improvements. • Section 179 deduction taken. • Deductions taken for depreciation. • Deductions taken for casualty losses, such as losses resulting from fires or storms. • How you used the asset. • When & how asset was disposed • Selling price. • Expenses of sale. 	
Ledgers and journals documenting financial activity:	Minimum of 7 years from tax or fiscal year end.
<p>School checkbook. Daily summary of cash receipts. Monthly summary of cash receipts. Check disbursements journal. Depreciation worksheet. Employee compensation record.</p>	
Any and all investment records	Minimum of 10 years
Insurance records:	Minimum of 10 years
<p>Policies Premium notices Claims Etc.</p>	

Administrative Responsibilities

The SCS School Business Manager shall assume administrative responsibilities associated with the Charter School’s financial duties. As the Charter School’s Financial Officer shall present the NMPED/CSD with a balanced budget consistent with the *1999 Charter Schools Act*. The SCS Governing Board shall approve all re-allocated money from within the budget. Administrative responsibilities of the SCS Business Manager shall include but not be limited to the following:

Salary Budgets

Budget requests submitted for salary accounts will be submitted with salaries determined by the SCS Governing Board. The “number of persons” covered will be noted in full-time equivalents (FTE) per the NMPED requirement; however, SCS shall not be required to use nor comply with any salary norms established by NMPED. The Business Manager shall submit salary budgets, including raises, pay scales, and policies, to the SCS Finance Committee for approval, and then to the SCS Governing Board for acknowledgement

Non-Salary Budget

Budget requests for non-salary accounts will be in specific dollar amounts. The SCS Business Manager will submit recommendations to the Finance Committee for review and approval, and then to the SCS Governing Board for approval. Once approved, the budget will be forwarded to NMPED to be included in the budget for the N.M. Public Education Department.

Budget Implementation

A temporary budget will be approved at the State Public Education Department Budget Hearing before June of each year. Necessary revisions will be incorporated into the final budget in July of each year.

The Business Manager shall be responsible for adhering to the approved budget.

Budget Monitoring

Upon request, the Business Manager will furnish the NMPED with a Budget Status Report that shows encumbrances and expenditures to date, and the unencumbered balance for review to demonstrate that encumbrances and expenditures are progressing in accordance with the budget plan. As a courtesy, the Business Manager shall also furnish the District with the required quarterly reports sent to the State.

Budget Changes

Before the opening of SCS and/or during the course of the school year, it is probable that budget changes, increases, or re-allocation of funds will be necessary. The Business Manager shall maintain an up-to-date budget with changes at all times, and report such to the SCS Governing Board during regular meetings.

Availability of Records

In accordance with the N.M. Charter School Law 22-8B-1 ff, SCS will provide all appropriate financial-related documentation to the NMPED Internal Audit unit upon request.

Textbook Record Retention Schedule

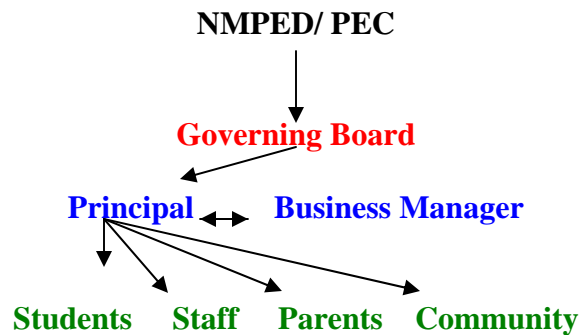
DESCRIPTION	RETENTION SCHEDULE
Textbook Inventory Listing Listing prepared annually by each school Which reports current inventory of schools	Until superseded by new listing
Textbook Adoption List, Copies Listing of all textbooks adopted by Public Education Department	Until superseded by new listing

VII. GOVERNANCE/MANAGEMENT PLAN

A. Governance Structure

This section addresses the application requirements of NMAC 6.80.4.8 [12-14-01] Section I, concerning SCS governing body.

Structure of the SCS Governing Body:



Policies and Procedures of the Governing Body

The Governing Body of the charter school has only the authority and powers as granted by the charter, which includes the Governing Body's bylaws. Consequently, a comprehensive set of Bylaws has been developed to address the policies and procedures for the SCS Governing Body, which will define for its membership the scope of each member's authority, both individually and collectively. SCS charter Members will be required to have a working knowledge of the bylaws. See By Laws in Appendix E.

Its members and functions elect the School Board, primarily, by majority vote. The Board will also rely on specific committees, which have defined responsibilities as described in the Bylaws. The Governing Board is elected by the School Founders.

Parent Conferences

SCS will conduct teacher-parent conferences in the fall and spring of each year to discuss each student's progress.

Parental Sponsor Agreements

Each parent will be asked to sign a Sponsor Agreement stating that they have read, understand, agree and support the school's Mission Statement and Educational philosophies as stated in the charter and education processes and procedures set forth in the Parent Handbook. As part of this agreement each Parent Sponsor will commit to being available for advice and assistance on academic matters concerning his/her child.

Administrative Communications

SCS through its Administrative Team (Principal and Business Manager) or selected spokesperson from its Board (President or designee) will strive to keep communications between it, the PEC and the NMPED/CSD professional and cooperative.

Charter schools will report twice yearly, in January and June, to the PEC. Reports will be made in writing and, if requested, in person. These reports may be quite brief for charter schools in the first year of operation. The following information will be included in each report:

- The name of the school and its address;
- The name and telephone number of the principal or a key contact person who is responsible for some or all of the principal duties of the school;
- The names, addresses, and telephone numbers of all members of the Governing Board;
- The number of students currently enrolled in the school and their grade levels;
- Compliance with conditions, standards or procedures set forth in the charter;
- Detail progress toward achievement of the state board minimum educational standards or student performance standards identified in the charter application;
- Financial audit and other evidence of responsible fiscal management;
- Violation of any provision of law from which the charter school was not specifically exempted

Funding

The PEC shall not retain more than 2% of SCS school-generated program cost, i.e. 98% of those monies generated by students enrolled in SCS from state or federal programs.

State Equalization Guarantee

The PEC will flow the charter schools monthly SEG funding to the charter school within five days of the PEC's receipt of such funds.

Special Education

The PEC will flow the charter school's proportionate share of IDEA-related funds to the charter school within five days of the PEC's receipt of such funds.

Title II Funding

SCS may be eligible to receive benefits from Title II funding through the PEC. The PEC agrees to provide these federal funds or services to SCS in the same manner as it provides these funds or services to the other schools in its district.

Enrollment Information

SCS shall timely provide student enrollment information, in the format requested by the PEC, and all other student data as required for the PEC to request federal funds or to complete requirements of a federal program application.

Central Services

All services centrally or otherwise provided by local districts, including custodial, maintenance and media services, libraries and warehousing will be subject to negotiation between SCS and the local districts. Any services for which SCS contracts with local districts will be provided by the local districts at a reasonable cost.

Dispute Resolution

The PEC and SCS agree to make a good faith effort to informally resolve disputes that may arise between them before implementing the process described below. A good faith effort means, that the parties have defined and described the issue in writing, given the other side at 1- 10 days to respond or correct the concerns rose by the written notice and had at 1 one face-to-face meeting in an attempt to resolve the issue(s). If this informal process does not adequately address the concerns PEC and SCS agree to engage a qualified individual to attempt a resolution through mediation.

Notice to Mediate

If the informal dispute resolution process has been exhausted, either party can request a formal mediation by submitting written-requests that shall include the following:

- The name and mailing address of a proposed mediator with dates of availability for the mediator and the requesting party;
- An itemized summary of the issues the requesting party believe has not be adequately resolved;
- A summary of the resolution requested by the initiating party.
- Said notice shall be mailed by certified mail, return receipt requested or served in person.

Response to Notice:

The receiving party shall respond within five business days of receipt of the notice to mediate. The response shall include the following:

- A) if the proposed mediator is unsatisfactory to the responding party then, the respondent shall propose an alternative mediator or
- B) a response to the initiating party's issues and a summary of the reasons why the resolution requested is not acceptable, or
- C) a response to the proposed dates for mediation.

Choice of Mediator

If the alternative proposed by the responding party is not acceptable to the party initiating mediation, then the parties will ask their Board Presidents' to agree on a third person, who shall be the mediator for the dispute.

Date for Mediation

In no event shall the mediation be held more than thirty (30) days from the date of the original request to mediate.

Location

The mediation shall be conducted at a neutral site that affords no advantage to any person attending the mediation session. The mediator shall have final authority as to the location of the session.

Materials

Prior to the mediation, each interested party shall prepare a written summary that contains a list of the issues to be resolved in the mediation and that party's position relative to each issue. A mediator may request additional information from either any party.

Attendance

All interested persons or representatives of interested persons shall attend the session and shall expect to participate for at least four hours. The person attending the mediation shall have the authority to enter into a settlement of disputes, subject to approval at an open meeting. The parties may be accompanied by their respective attorneys.

Written Memorandum of Settlement

If an agreement is reached, the parties shall commit the agreement to writing and each side shall sign indicating their intent to be bound by the terms of the agreement.

Costs

The costs of mediation shall be borne equally by the parties unless, in the sole discretion of the mediator, either party is not participating or negotiating in good faith. The mediator may then assess the costs in a proportion he or she deems appropriate under the circumstances.

Litigation

In the event that either party is required to file suit to enforce the terms and provisions of the Charter, the prevailing party shall be entitled to reasonable attorney fees and costs.

• DESCRIPTION OF THE GOVERNING BODY
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The Governing Body (herein called the "School Board" or "Board") protects and guides the school's mission and vision. The Board is the final authority in the school. Its ultimate role is to hire the school Principal and approve policies. The Board's purpose, structure, composition, powers, selection process, relationship to Board, and other governing responsibilities are described more particularly in the By Laws in Appendix E. It is intended to attest to the founders' design that the school will be operated through a governing effort of the founders, admin, parents, and faculty and community members. The Board's purpose, structure, composition, powers, selection process, relationship to community, parents and faculty, and other governing responsibilities are described more particularly in the By Laws in Appendix E.

Relationship of the Board to the PEC and the NMPED

General Description:

SCS will be accountable to the PEC to the extent required by the Charter School Act, NMSA 1978 §§22-8B-let seq. (1999) and as otherwise provided for by the Public School Code, Chapter 22 NMSA 1978. The Board will develop a good work relationship with NMPED/CSD.

The ongoing operation and administration of the SCS will be the responsibility of the SCS Board and the school's Administrative team composed of the Board President and Board Vice President and Principal. Upon approval of the SCS charter application, the charter application including its appendices will constitute a binding contract between SCS and the NMPED/CSD, PEC

Relationship of the Board to Its Staff

Principal

The Principal shall serve as the Instructional Leader of the charter school, as well as provide such other services and the Board shall assign duties as. The Principal may also serve as supplementary teacher and substitute throughout the school. At all times, the Principal shall account to and serve at the direction of the Board and may be removed by a majority vote of the Board, with or without cause, whenever in its judgment the best interests of the school are served by such action. The Board will supervise and evaluate the Principal. The Principal will be accountable to the President of the Board. The Principal will interview and recommend candidates for teaching positions. The Board will contract with the SCS staff based on recommendations of the Principal and Administration Team. The Board is also responsible for adopting and changing personnel policies. The Board will approve all terms and conditions of employment for SCS staff and contractors. A more complete description of the Board's authority and policies concerning employees is described in the Board's bylaws.

1. Governing Board Member and Qualifications

1. Roy Solomon

Montessori Parent & Grand-Parent since 1993
Commercial Land Development NM
Commercial Businessman, NM, AZ,
Founder/ Owner Business Manager –
505 Restaurants and trademark Albuquerque, NM

2. Ann Tekin

Montessori Parent & Grandparent since 1984
Co- Owner and Land Developer of The Montessori School, Inc. 1987-1992
Property located at 3821 Singer Blvd. NE, Albuquerque, NM
Developed property, build building, raised financing, School Business Manager
Commercial Land Development & Real Estate
Business Owner: Select Properties, Albuquerque
Commercial Real Estate Management Company

3. Jeanne Soule Meihuis

Parent of APS Graduate

Commercial Banking Experience

2004-May 2005 Interim Board Advisor to the

Montessori Elementary Charter School, 2004-May 2005

President S&S Financial, LLC Residential and Commercial

4. Christine Brundage

Montessori Parent since 2008

Editor, Grant Writer

Currently working for INTEL in Personnel Management

5. Julia Gallegos

Montessori Parent since 2004

Assistant Professor of Psychiatry, UNM School of Medicine

Subspecialty in Addiction Psychiatry

6. Lynne Hsu Xavier.

Montessori Parent since 2008

Presbyterian Healthcare Services

Medical Coding Auditing Services

Editor, Writer

7. Ken Tekin

Montessori School Graduate

Commercial Land Development & Real Estate

Business Partner Select Properties, Albuquerque

Commercial Real Estate Management Company

2. Plan descriptions for governing body member recruitment and selection, including the orientation process for new members and ongoing professional development.

Notification to Parents of Governing Body Activities

Start-up

Prior to the opening of SCS first year, the Governing Body will comply with the Open Meetings Act and provide notification consistent with the provisions of that statute. In addition, SCS will notify parents and community members of its anticipated opening date, enrollment periods and other pertinent information about the school through newspapers, flyers, e-mail messages and other media.

Open Meetings

Once school opens, the Governing Body will continue to conduct its meetings in compliance with the Open Meetings Act as described more particularly in its Bylaws. Prior to the formal acceptance of the charter application, SCS will make every effort to keep parents and community members apprised of the progress of the charter application and give

consideration to their suggestions and input concerning all matters related to the school.

Resolution

A sample resolution proposing SCS procedures for complying with the provisions of the Open Meetings Act is attached to the Bylaws. A substantially similar resolution will be adopted at the first meeting of the Board, after the charter is approved by the PEC and each year thereafter as required by law.

Professional Educators

In addition to public notification of school board “Open Meetings”, SCS will actively recruit the most talented staff available using newspapers, on-line advertisement, personal contacts and other communication media.

<h3>3. The nature and extent of staff, families, and the community involvement in the governance of the school, and how they will be notified of the opportunity to participate in the school governance</h3>
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Parent Outreach

Because parents will be an integral part of the school, serving on the Board and other school based committees will be encouraged. Parental involvement in the decision making process will include:

- Encouraging parents to serve as school volunteers
- Promoting and strengthening parental responsibility and involvement.
- Encouraging parents to serve on the Board and other school-based committees.
- Recognizing the importance of the community's historic, ethnic, linguistic, and/or cultural resources in generating interest in family involvement.
- Scheduling programs and activities in a flexible manner to reach a diverse group of families.
- SCS will communicate with parents and families on a consistent basis. Parents (or guardians, as appropriate) will be aware not only of what students need materially, physically, and emotionally to be successful learners, but also what students are learning.
- Family members will acquire news and information relevant to parenting through a variety of methods that may include hands-on materials, e-mail, and Internet access. Parents will be encouraged to collaborate with SCS for the development and adoption of parental involvement policies and strategies. An open invitation to participate in school affairs will be actively communicated and widely distributed.

Staff-Parent and Community Involvement with the Board

Parent- Teacher Committee (PTC)

This committee will advise the Principal and the Board on issues concerning school climate, community involvement, student activities, proposed budgets, ways to involve parents in the charter schools, fund raising, and serve as an example for students in building community support and for education in general.

- **Composition of PTC**
Two (2) parents of children enrolled in the school; two (2) teachers on SCS staff; one (1) member from the general school community and SCS Principal.
- **Selection of PTC Members**
The initial PTC members shall be selected by the Board from nominations and letters of interest. Nominations and requests for letters of interest will be solicited by notices posted at the school at least two weeks prior to the section. The PTC, once convened, will determine its structure of Governing and selection process for vacancies.
- **Activities of PTC**
The PTC will help SCS staff sponsor parent education nights throughout the year to afford parents the opportunity for their own continued education in their child's ongoing development and Montessori education

Staff Involvement

The staff is encouraged to participate in the Board and Board committees. The Principal and Administrative Team will maintain an “open door” policy for suggestions from the staff as to how to improve any issue concerning the school.

Notification of Opportunities for School Involvement

We believe parents will be our greatest asset in achieving our mission. We believe that time spent explaining how to become involved in their child’s education will lead to parents who are much more active in their children’s education. In order to facilitate this relationship we will take the following steps:

- Designate room parents to help acclimate new families as well as assist the teacher in publishing a weekly or monthly newsletter communicating Themes, important dates, volunteer opportunities, and the like.
- Recruit a minimum of one parent for Board membership. The parent(s) would be responsible for communicating with the room parents and the PTO regarding issues decided by the board and issues which need to be brought before the board.
- Include the parent in the individual instruction time to ensure meaningful contact takes place at least once a month.
- Inform staff through staff meetings and newsletters on how to work with the parent volunteers and to build a strong and supportive school community team.
- Provide focus groups lead by parents or volunteers on topics of interest (i.e. special needs, methods to help children learn to read, nutrition, effects of television on a child.)

- Conduct six or more Family Events each year including: orientation, performance demonstrations, parent education night, musical events, Spring Fling, Talent Shows, (or other fun, school wide activity) Include parents in staff training when appropriate.
- Encourage parents to volunteer in the classroom, around the school, and on field trips. Verify during staff interviews that they have ideas of how to use parental help meaningfully. Additionally, communicate early in the year types of help each teacher desires from parents to avoid misunderstandings.

• PARTNERSHIPS

As soon as the charter is approved the grant team will begin the search. See Appendix H.

D. SCHOOL ORGANIZATIONAL STRUCTURE

Staffing Plan

School Year	Grade Levels	Student		Staff	
		Enrollment	Ratio	Teacher	Aid
First Year 2010-11	K-	20	10-1.0	Kdg-1 +	1.0aid
	1 st -	21	10.5-1	1 st -1	1.0aid
	2 nd -	21	10.5-1	2 nd -1	1.0aid
	3 rd -	21	10.5-1	3 rd -1	1.0aid
	4 th -	24	12.0-1	4 th -1	0.5aid
	5 th -	24	12.0-1	5 th -1	0.5aid
	6 th -	24	12.0-1	6 th -1	0.5aid
	7 th -----	24	12.0-1	7 th -1 *	0.5aid
8 th -----	24= 203	12.0-1	8 th - 1 *	0.5aid	
Second Year 2011-12	K-8 add 9 th	24= 227	18.0-1	9 th 2 *	0.5aid
Third Year 2012-13	K-10 th add 10 th	24= 251	18.0-1	10 th 2 *	0.5aid
Fourth Year 2013-14	K-11 th add 11 th	24= 275	18.0-1	11 th 1 *	0.5aid
Fifth Year 2014-15	K-12 th add 12 th	24= 299	18.0-1	12 th 1 *	0.5aid

Year 1 9 teachers 6.5 aids 1 Principal 1 Business Manager
Year 2 11 teachers 7.0 aids 1 Principal 1 Business Manager
Year 3 13 teachers 7.5 aids 1 Principal 1 Business Manager
Year 4 14 teachers 8.0 aids 1 Principal 1 Business Manager
Year 5 15 teachers 8.5 aids 1 Principal 1 Business Manager

Does not include other support staff, TESOL, SPED, PE, etc.
***Adolescents grades 7-9th mid-high / grades 10th -12th senior-high**

Student Teachers Ratios for grades 4-12 show hiring a .5 aid for each 24 students but the written ratio is for a 1.0. The Principal will be able to juggle assistants around special classes, i.e. computer labs, Spanish, Music and Art to meet the ratios presented.

E. Site Based Management Structure / Employee Relations

See Appendix B – Employee Handbook

Administrative Staff

The administrative staff and any other employees, including instruction aides shall be evaluated at least once annually. Each staff member must be familiar with and supportive of the unique needs of a Montessori School via its philosophy of education and the curriculum needs of students.

Principal

The evaluation of the SCS principal will be conducted by the SCS Board in compliance with NMAC 6.69.3.9 [06-14-01]. The SCS Charter provides the SCS Board with the Principal qualification, and competencies set forth in the regulation, which meet the requirements for NCLB, the NM State requirements, the American Montessori Society (AMS), and the Montessori Accreditation Council for Teacher Education (MACTE). The competencies and indicators are below entitled “Competencies and Indicators for Evaluating the SCS Principal.

In addition to the competency criteria outlined in paragraph regarding Evaluation of Staff/Principal in this section, the SCS principal’s responsibilities will be those set forth in this “Position Description.”

Position Description: Principal

The Principal shall be responsible directly and indirectly for school-based operations and share the decision-making process of SCS with the SCS School Board. The Principal will serve as the site Instructional Leader of SCS and will share responsibility for the Montessori academic operation and success, and the success of the school in general. The Principal will supervise all relevant staff members regarding the school’s academic success. All school employees are directly responsible to the Board. .

The Principal shall be responsible for interviewing candidates for all staff positions and making recommendations for hiring to the Board. The same process of operation would be in effect for the termination of an employee. The Principal shall have the authority to recommend termination of staff to the Board. The Principal shall be directly responsible to the Board that has the ultimate responsibility for hiring/termination.

Expectations of the Principal

Ultimately accountable over all affairs of the school as related to the AMS and MACTE standards and procedures for running an “Authentic Montessori School (AMS)” (see Appendix K)

- Appropriate professional certifications and degrees in the related fields of education
- Demonstrated ability to allocate and manage a major budget for a complex organization
- Possesses responsibility for evaluation and growth plans for school

- Demonstrated preparation to perform duties numerous projects simultaneously
- Demonstrated ability to comprehensively address all personnel
- Demonstrate ability to facilitate groups of people from diverse backgrounds and interests
- Demonstrated ability to oversee a physical plant including its use, maintenance and new construction
- Demonstrated knowledge of and commitment to the mission statement, guiding principles, goals, and delivery of instruction
- Demonstrated ability to empower others and delegate both responsibility and authority to others
- Demonstrated characteristics of honesty, integrity and a sense of humor
- A proven record of collaboration with staff, parents and community members
- Evidence of on-going professional growth

Directly Responsible to: SCS Board

Qualifications

Montessori Requirements

- AMS Montessori teaching certificate at the 6-12 level
- 10 or more years lead teaching in a Montessori classroom
- In addition, candidates must hold an AMS Administrative License or be enrolled in an AMS Administrative program within two years of being hired.
- Willing to enroll in the NAMPTA 12-18 Montessori Training Program, during the summer of the second year of hire.

State Requirements

A level three-B license from the NMPED or equivalent.

Minimum Salary

In accordance with NMSA 1978 §§ 22-10A-7 through 22-10A-11 as applicable to particular job assignment.

A. The Principal must be a NM Certified Principal.

In addition,

B. The Principal/instructional Leader of SCS must be a MACTE certified, experienced Montessori Teacher with at least 5 years of Montessori Teaching experience.

C. Within the first two years of hire/service, the Principal must attend and pass a MACTE approved Montessori Leadership Program.

“Competencies and Indicators” for Evaluating SCS’ Principal

1. The principal demonstrates foresight, examines issues, and takes initiatives to improve the quality of Montessori education in the community.
 - (a) Enables staff, students, parents, and community to build a common vision;
 - (b) Articulates a vision and is able to make that vision concrete to others.
 - (c) Provides a learning environment and climate where creativity, risk taking, and

- experimentation are shared by all stakeholders.
- (d) Understands, facilitates, and manages change in self, others, and the organization.
2. The principal embraces and encourages the acceptance of diversity.
 - (a) Models respect, understanding, and appreciation for all people.
 - (b) Addresses the special needs of groups and individuals.
 - (c) Addresses the needs of multicultural, multilingual, multiracial, and economically diverse populations.
 - (d) Promotes and supports recruitment and assignment of diverse staff.
 - (e) Demonstrates sensitivity to Montessori educational philosophies and methodologies.
 3. The principal uses effective people skills to communicate.
 - (a) Addresses the needs of staff, students, parents, and community.
 - (b) Facilitates communication and the use of problem solving processes to promote teamwork, consensus, and inquiry.
 - (c) Assists with the resolution of conflicts and stress.
 - (d) Implements the staff evaluation process effectively.
 - (e) Writes and speaks appropriately.
 - (f) Keeps staff and community informed of pertinent information in a timely manner.
 - (g) Utilizes appropriate listening skills.
 4. The principal provides and maintains an environment where optimal student growth can take place.
 - (a) Understands and supports the goals and purposes of the organization.
 - (b) Promotes learning as the primary purpose of the organization.
 - (c) Collaborates and networks with community service agencies, other educational organizations and businesses, as appropriate.
 - (d) Provides and maintains a safe and healthy environment that promotes positive student behavior.
 - (e) Understands and encourages the application of human growth and development principles.
 - (f) Assesses and evaluates program and staff effectively.
 5. The principal demonstrates instructional leadership within the framework of AMS and MACTE expectations. See Appendix G (AMS) and K (MACTE)
 - (a) Seeks out and provides staff with information on methodology, research, and current educational trends within the Montessori standards.
 - (b) Identifies, accesses, and uses appropriate resources.
 - (c) Makes reasonable decisions and accepts responsibility for those decisions.
 - (d) Promotes collaboration and mutual sharing among teachers and staff.
 - (e) Encourages and allows others to lead as appropriate.
 6. The principal demonstrates an understanding of the dynamics of the AMS Montessori educational organization,
 - (a) Develops positive school/community relations.

- (b) Demonstrates an understanding of the politics of school and operations.
 - (c) Informs staff, parents, and community of relevant facts to aid in reaching informed decisions.
 - (d) Exhibits skills in comprehending, interpreting, and supporting positions of the organization.
 - (e) Exhibits skills in lobbying, negotiating, collective bargaining, policy development, and policy maintenance.
 - (f) Exhibits effective public relations skills.
7. The principal effectively manages the resources for which he/she is responsible including personnel, finances, facilities, programs, and time.
 - (a) Implements district policies, state standards, and federal regulations and laws.
 - (b) Organizes, coordinates, and supervises staff assignments and needs.
 - (c) Carries out appropriate fiscal procedures.
 - (d) Utilizes and maintains facilities.
 - (e) Demonstrates efficient time management by establishing schedules and reasonable timelines for completing tasks.
 - (f) Utilizes available technology to meet administrative objectives.
 - (g) Utilizes participatory management techniques.
 8. The principal uses AMS/MACTE Montessori Standards for supervision, staff development, and performance evaluation to improve the educational program.
 - (a) Implements a Board process in staff development.
 - (b) Identifies and acknowledges effective performance in objective terms.
 - (c) Assists individual professional development planning.
 - (d) Develops, implements and evaluates the staff development program, collaboratively utilizing a variety of resources.
 - (e) Follows procedures and participates in Montessori training consistent with the state and local Teacher Performance Evaluation Plan.
 - (f) Provides regular feedback on performance.
 9. The principal maintains a familiarity with current Montessori educational issues through a process of ongoing personal development.
 - (a) Meets statutory contact hour requirements.
 - (b) Participates in local, state, and other training opportunities including Montessori programs and workshops.
 - (c) Reviews current professional literature.
 - (d) Continues to expand knowledge and awareness of programs within the school district.
 10. Each school district shall select and/or develop additional Montessori competencies and indicators determined appropriate by the school district to complete the total

- system of principal evaluation.
11. Each school district shall provide training in Montessori compatible conference skills and growth planning to all principals/administrators and supervisors of principals/administrators.
 12. The principal performance evaluation system shall include at 1 the following components.
 - (a) Collect data on the principal's/administrator's *performance* to determine the presence and extent of competencies demonstrated.
 - (b) Confer with the principal prior to each observation and as soon as possible after each data collection instance to ensure the adequacy, accuracy, and completeness of the information obtained.
 - (c) Identify strengths and areas of the principal's/administrator's performance where growth can occur.
 - (d) Collaborate with the principal on the development of a written plan for improvement or growth. The plan should include follow-up data collection and conferences with the principal to determine progress toward completion of the plan.
 - (e) Provide assistance to the principal through individual guidance, workshops, classes, or other such means for completing the growth plan within the Montessori Philosophy.

<p>Business Administrator/Manager</p>
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The SCS Business Manager will meet the qualifications as described in the “Position Description: Business Manager” as set forth in the Employee Manual.

Position Description: Business Administrator/Manager

The Business Administrator is responsible for all oversight of money and budget management for the school. He/she reports directly to the Principal and the SCS Board.

Expectations for the Position of Business Administrator

The Business Administrator/ fiscal manager and shall be directly and indirectly responsible for financial operations of SCS. The Business Administrator is responsible for administering the budget as determined by the SCS Board, supervising all relevant staff members regarding school finances.

- Demonstrated excellence in managing budgets upwards of \$500,000
- Demonstrated knowledge and high competence for *accurate* reporting
- Ability to identify and comply with all regulations relevant for a charter school
- Proven track record of successful work at similar organization
- Demonstrated ability to relate well with staff, parents and the community
- Demonstrated *characteristics* of honesty, integrity and a sense of humor
- Demonstrated ability to work in a shared responsibility decision making model

- Evidence growth from intermittent evaluation
- Evidence of on-going professional growth
- Demonstrated history of providing effective, innovative instruction
- Demonstrated knowledge of and commitment to the mission statement, guiding principles, goals, and delivery of instruction
- Demonstrated ability to work in a shared-responsibility decision-making, model by participating in site-based Board and parent/teacher meetings
- A proven record of collaboration with colleagues, parents, and community
- Members as a volunteer in the community
- Demonstrated characteristics of honesty, integrity and a sense of humor demonstrated ability to work well with children
- Evidence of on-going professional growth
- Open to intermittent evaluations and evidence improvement as a result of evaluations
- Evidence of on-going professional growth
- Evidence of successful background checks

Qualifications

Licensure in accordance with NMSA 1978 §§ 22-10A-7 through 22-10A-11 as applicable to particular job assignment.

Minimum Salary

In accordance with NMSA 1978 §§ 22-10A-7 through 22-10A-11 as applicable to particular job assignment.

Qualifications

The Business Manager/Administrator will be a licensed certified business manager as required by NMAC 6.63.12.8 [01-01-03] which requires the following:

- (1) a current certified public accountant certificate; or
- (2) a bachelor's, master's, or doctorate degree in accounting, business, or a related field with at least twenty four semester hours in accounting or business coursework from a regionally accredited or department approved college or university; or
- (3) an associate's degree in accounting or a related field from a regionally accredited or department approved college or university including at least twenty-four semester hours in accounting or business courses from a regionally accredited or approved college or university plus at 1 three (3) years of verifiable, employment experience as a school business official. In addition to satisfying these requirements contained a candidate receiving an initial school business license shall be issued a one-year conditional license that shall convert automatically to a three-year Level I license provided that during this first year the person satisfactorily completes a training program approved by the public education department ("department").

Teaching Staff

In addition to the competency criteria outlined in the paragraph regarding Evaluation of Staff: Teacher on page 2 of this section, a teacher's responsibility will also include those as outlined in this "Position Description."

Position Description: Teachers

Teachers are an integral part of the school and shall be primarily responsible for the education of students in the classroom. The teachers shall have a firm belief and support for the educational philosophy, instructional methods and curriculum set forth in this charter. They shall be fully certified Montessori instructors and shall understand and be committed to the philosophy of the school. They shall have a strong desire to help all students learn to their individual potential and accordingly shall set high expectations for their students. Teachers are expected to insure that all students meet the curriculum goals and provide a challenging yet supportive learning environment in the classroom.

The Teacher will report directly to the school Principal. The Teacher provides the leadership and knowledge needed to plan for each student's learning and the development and implementation of the curriculum.

Expectations for the Position of Teacher

- B.A./B.S. or higher, and possess teacher certification
- Certification in Montessori instruction or agreement to be trained in the Montessori philosophy at the level of their position
- Demonstrated competency to deliver an educational program
- Demonstrated history of providing effective, innovative instruction
- Demonstrated knowledge of and commitment to the mission statement, guiding principles, goals, and delivery of instruction
- Demonstrated ability to work in a shared-responsibility decision-making, model by participating in site-based Board and parent/teacher meetings
- A proven record of collaboration with colleagues, parents, and community Members as a volunteer in the community
- Demonstrated characteristics of honesty, integrity and a sense of humor demonstrated ability to work well with children
- Evidence of on-going professional growth
- Open to intermittent evaluations and evidence improvement as a result of evaluations
- Evidence of on-going professional growth
- Evidence of successful background checks

Directly Responsible to: The SCS Principal and Board

Qualifications

Licensure in accordance with NMSA 1978 §§ 22-10A-7 through 22-10A-11 as applicable to particular job assignment.

Minimum Salary:

In accordance with NMSA 1978 §§ 22-10A-7 through 22-10A-11 as applicable to particular job assignment.

[01-15-99; 6.69.3.9 NMAC - Rn, 6 NMAC 4.5.2.9, 06-14-01]

Teachers

The plan for annual teacher performance evaluations shall be developed in accordance with the requirements of NMAC 6.69.4.10 [9-30-03]. Once a principal is hired, he or she will be responsible for developing the plan that shall substantially follow the requirements of the plan that are attached as an exhibit entitled “Teacher Evaluation Plan Requirements” to Section J. In addition to the competency criteria outlined in the regulation for administrators, the SCS principal will also be evaluated based on his or her performance of responsibilities outlined in the Position Description: Principal as set forth the Employee Manual.

Teacher Evaluation Plan Requirements

- A. No later than forty school days *after* the first of school of *each* school year, *each* teacher and his or her school principal shall establish a professional development plan for the teacher, with measurable objectives, for the coming *year* based on, among other things:
 - (1) the NMPED’s nine teaching competencies and indicators for the teachers licensure level; and
 - (2) the previous years annual evaluation, if applicable; and
 - (3) assurance that the teacher is highly qualified in the core academic subject(s) the teacher teaches and that the district has appropriately assigned the teacher to teach in the subject(s) in which the teacher is highly qualified, as defined in this rule.
- B. Annual performance evaluations shall be based on, among other things, how well the professional development plan was carried out and the measurable objectives were achieved.
- C. The school principal shall observe each teacher’s classroom practice at 1 once annually to determine the teacher’s ability to demonstrate state adopted competencies and indicators for each teacher’s licensure level.
- D. If a level II or level II-A teacher does not demonstrate essential competencies for a given school year, the school district shall provide the teacher with professional development and peer intervention, including mentoring, for a period the school principal deems necessary. If by the end of that school year the teacher still fails to demonstrate essential competencies, a district may choose not to contract with that teacher.

- E. If a level III-A teacher does not demonstrate essential competencies at level III-A for a given school year, the school district shall provide the teacher with professional development and peer intervention, including mentoring, for a period the school principal deems necessary. If by the end of the following school *year* the teacher still fails to demonstrate essential level III-A competencies, the Board may recommend to the Secretary of the Public Education Department that the teacher's level III-A license be suspended until such time as the teacher demonstrates the essential competencies at level III-A. Depending on the outcome of any due process proceeding under the Uniform Licensing Act, Section 61-1-1 through 61-1-31, NMSA 1978, and if the superintendent verifies that the teacher meets the standards for a level II license, the teacher may be issued a level II license during the period of level III-A licensure suspension. A suspended level III-A license may be reinstated by the state superintendent of public instruction either upon verification by a local superintendent that the teacher now demonstrates the essential competencies at level III-A or through the process described in 6.69.4.11 NMAC.
- F. Any teacher who held a level II or level III-A license prior to April 4, 2003 shall meet the requirements of the high objective uniform standard of evaluation of level of licensure through the annual evaluation process by September 1, 2006 or shall not be eligible for the increased base salary provided in 22-10A-11 (C), NMSA 1978.
- G. Every two years, school principals shall attend a training program approved by NMPED/AMS to improve their teacher evaluation skills.

Level I: Licensure Evaluation Criteria

Montessori Teachers holding a Level I License shall be *evaluated* using the following objective standard of evaluation and include the following *standards* and indicators as evaluation criteria, as well as, the Montessori Teacher standards within the AMS/MACTE teacher guidelines for Montessori teacher competencies, Teachers in "Special Areas" such as Art, Language and Music will also be familiar with and use the Montessori Philosophy and work within its framework.

- (1) The teacher accurately demonstrates knowledge of the Montessori content *area* and approved AMS curriculum.
 - (a) utilizes and enhances curriculum.
 - (b) gives clear explanations relating to lesson content and procedure.
 - (c) communicates accurately in the content area.
 - (d) shows interrelatedness of one content area to another.
- (2) The teacher appropriately utilizes a variety of teaching styles and resources which complement the Montessori curriculum for each area taught.
 - (a) provides opportunities for students to work independently, in small groups, and in large groups, as appropriate.
 - (b) uses a variety of methods such as demonstrations, lecture, student-initiated work, group work, questioning, independent practice, etc., as appropriate.

- (c) uses a variety of resources such as field trips, supplemental printed materials, manipulative, etc., as appropriate.
 - (d) provides opportunities for students to apply, practice, and demonstrate knowledge and skills learned through various modalities.
 - (e) implements necessary modifications and adaptations in instruction and curriculum so that students with disabilities have access to the general education curriculum in the 1 restrictive environment.
- (3) The teacher communicates with and obtains feedback from students in a manner that enhances student learning and understanding.
- (a) explains and/or demonstrates the relevance of topics and activities.
 - (b) communicates to students the instructional intent, directions or plan at the appropriate time.
 - (c) establishes and states expectations for student *performance*.
 - (d) clarifies actions, directions, and explanations when students do not understand.
 - (e) actively solicits communication from students about their learning.
 - (f) communicates regularly with students about their progress.
- (4) The teacher comprehends and applies appropriately the Montessori Planes of Development principles for student growth, development and learning.
- (a) uses and instructs students in the use of cognitive thinking skills such as critical thinking, problem-solving, divergent thinking, inquiry, decision-making, etc.
 - (b) uses teaching techniques which address student learning levels, rates, and styles.
 - (c) uses Montessori materials and media, which address student learning levels, rates and styles.
 - (d) uses resources such as community service agencies, school personnel, parents, etc., to meet students' learning levels, rates, and styles within the Montessori framework.
- (5) The teacher effectively utilizes the school's standard of testing student assessment techniques and procedures.
- (a) uses the school's approved assessment tools and strategies, as appropriate.
 - (b) uses information gained from ongoing assessment for remediation and instructional planning.
 - (c) maintains documentation of student progress.
 - (d) communicates student progress with students and families in a timely manner.
- (6) The teacher manages the Montessori educational setting in a manner that promotes positive student behavior, and a safe and healthy environment.
- (a) serves as a model for constructive behavior patterns.
 - (b) executes routine tasks effectively and efficiently.
 - (c) establishes and states school's expectations for student behavior.
 - (d) handles transitions effectively.
 - (e) has Montessori curriculum materials and media ready for student use.
 - (f) minimizes distractions and interruptions.
 - (g) manages student behavior effectively and appropriately within Montessori guidelines.
 - (h) identifies hazards, assesses risks, and takes appropriate action.
- (7) The teacher recognizes student diversity and creates a Montessori atmosphere conducive to the promotion of positive student involvement and self-concept.

- (a) demonstrates sensitivity and responsiveness to the personal ideas, learning needs, interests, and feelings of students with disabilities, and/or from culturally and linguistically diverse backgrounds (e.g., Native Americans, Hispanic Americans, African Americans, Asian Americans, as well as other recent immigrant groups.)
 - (b) acknowledges student performance and achievement.
 - (c) acknowledges that every student can learn.
 - (d) provides opportunities for each student to succeed.
 - (e) provides students with opportunities for active involvement and creativity.
 - (f) provides opportunities for students to be responsible for their own behavior and learning.
 - (g) promotes positive student/teacher relationships.
 - (h) encourages high student expectations.
 - (i) demonstrates an awareness and respect for each student's background, experience, learning ability, language and culture.
- (8) The teacher demonstrates a willingness to examine and implement change, according to AMS Montessori Standards.
- (a) seeks out information on methodology, research, and current trends in Montessori Education to enhance and improve the quality of learning.
 - (b) implements a variety of Montessori strategies to enhance learning.
 - (c) recognizes that change entails risk and that modifications may be needed.
- (9) The teacher works productively with colleagues, parents, and community members.
- (a) collaborates with colleagues.
 - (b) communicates with parents on a regular basis.
 - (c) uses conflict resolving strategies when necessary.
 - (d) involves parents and community in their learning environment.
 - (e) communicates in a professional manner with colleagues, parents, and community members regarding educational matters.

Level II: Licensure Evaluation Criteria
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Montessori Teachers holding a Level II License shall be *evaluated* using the following objective standard of evaluation and include the following *standards* and indicators as evaluation criteria as well as the Montessori Teacher standards within the AMS teacher guidelines for Montessori teacher competencies. Teachers in “Special Areas” such as Art, Language and Music will also be familiar with and use the Montessori Philosophy and work within its framework.

- (1) The teacher accurately demonstrates knowledge of the Montessori content *area* and approved AMS curriculum.
 - (a) utilizes and enhances curriculum.
 - (b) gives clear explanations relating to lesson content and procedure.
 - (c) communicates accurately in the content area.
 - (d) shows interrelatedness of one content area to another.
- (2) The teacher appropriately utilizes a variety of teaching styles and resources which complement the Montessori curriculum for each area taught.
 - (a) provides opportunities for students to work independently, in small groups, and in large groups, as appropriate.

- (b) uses a variety of methods such as demonstrations, lecture, student-initiated work, group work, questioning, independent practice, etc., as appropriate.
 - (c) uses a variety of resources such as field trips, supplemental printed materials, manipulative, etc., as appropriate.
 - (d) provides opportunities for students to apply, practice, and demonstrate knowledge and skills learned through various modalities.
 - (e) implements necessary modifications and adaptations in instruction and curriculum so that students with disabilities have access to the general education curriculum in the 1 restrictive environment.
- (3) The teacher communicates with and obtains feedback from students in a manner that enhances student learning and understanding.
- (a) explains and/or demonstrates the relevance of topics and activities.
 - (b) communicates to students the instructional intent, directions or plan at the appropriate time.
 - (c) establishes and states expectations for student *performance*.
 - (d) clarifies actions, directions, and explanations when students do not understand.
 - (e) actively solicits communication from students about their learning.
 - (f) communicates regularly with students about their progress.
- (4) The teacher comprehends and applies appropriately the Montessori Planes of Development principles for student growth, development and learning.
- (a) consistently integrates the use of cognitive thinking skills such as critical thinking, problem-solving, divergent thinking, inquiry, and decision-making into instruction.
 - (b) adapts teaching techniques to accommodate a range of student learning levels, rates, styles and special needs.
 - (c) uses Montessori materials and media to address a range of student learning levels, rates, styles and special needs.
 - (d) selects from a variety of community service agencies, specialized school personnel, and parents to address different learning levels, rates, styles, and needs within the Montessori framework.
- (5) The teacher effectively utilizes the school's standard of testing and student assessment techniques and procedures.
- (a) uses the school's approved assessment tools and strategies for specific learning outcomes.
 - (b) uses formative and summative assessment for remediation and instructional planning.
 - (c) maintains documentation of student progress.
 - (d) consistently maintains communication with students and families about student progress.
- (6) The teacher manages the Montessori educational setting in a manner that promotes positive student behavior, and a safe and healthy environment.
- (a) identifies, explains, and models constructive behavior patterns.
 - (b) establishes and teaches effective and efficient routines.
 - (c) establishes and reinforces expectations for student behaviors that promote citizenship in a classroom community.
 - (d) maintains smoothness and momentum during classroom transitions.
 - (e) prepares and arranges Montessori curriculum material in advance for easy student accessibility.

- (f) minimizes distractions and interruptions.
 - (g) monitors and directs student behavior effectively and appropriately within Montessori guidelines...
 - (h) identifies hazards, assesses risks, and takes appropriate action.
- (7) The teacher recognizes student diversity and creates a Montessori atmosphere conducive to the promotion of positive student involvement and self-concept.
- (a) acknowledges and validates the ideas, learning needs, interests, and feelings of students with disabilities and/or from culturally and linguistically diverse backgrounds (e.g., Native Americans, Hispanic Americans, African Americans, Asian Americans, as well as other recent immigrant groups).
 - (b) consistently recognizes student performance and achievements.
 - (c) understands how students differ in their approaches to learning and adjusts instruction to meet diverse needs.
 - (d) designs opportunities for each student to succeed, based on individual learning needs.
 - (e) designs specific activities that require active involvement and creativity.
 - (f) designs opportunities that require and reinforce student responsibility for learning.
 - (g) develops students' self-esteem, motivation, character, and sense of civic responsibility.
 - (h) establishes and communicates high expectations for all students.
 - (i) demonstrates knowledge of different student backgrounds, experiences, learning abilities, languages and cultures and incorporates this knowledge into curricular decisions and instructional methodology.
- (8) The teacher demonstrates a willingness to examine and implement change, according to AMS Standards.
- (a) seeks out information on methodology, research and current trends in Montessori education to enhance and improve the quality of learning.
 - (b) demonstrates knowledge of best Montessori practices that enhance learning.
 - (c) participates in Montessori instructional improvement and school reform initiatives.
- (9) The teacher works productively with colleagues, parents, and community members.
- (a) actively promotes collegial relations with other school personnel.
 - (b) provides a system for interactive communication between teacher and parents.
 - (c) uses conflict resolution strategies as appropriate.
 - (d) promotes active roles for parents and community members in student learning
 - (e) communicates in a professional manner with colleagues, parents, and community members regarding educational matters.

Level 111: Licensure Evaluation Criteria

- A. Montessori Teachers holding a Level III License shall be evaluated using the following objective standard of evaluation and include the following standards and indicators as evaluation criteria as well as the Montessori teacher standards within the AMS teacher guidelines for Montessori competencies. Teachers in special areas such as Art, Language and Music will also be familiar with and use the Montessori Philosophy and work within its framework.
- (1) The teacher accurately demonstrates knowledge of the content *area* and approved AMS curriculum.

- (a) contributes to the refinement and development of the approved curriculum.
 - (b) provides clear explanations relating to lesson content and procedures in multiple ways and is aware of knowledge and preconceptions that students can bring to the subject.
 - (c) communicates accurately in content area ,can create multiple paths to subject matter.
 - (d) can articulate to students the interrelatedness of the disciplines.
- (2) The teacher appropriately utilizes a variety of teaching styles and resources which complement the Montessori curriculum for each area taught.
- (a) designs and engages students in large & small groups and independent work activities.
 - (b) demonstrates effective selection and use of a variety of methods to make knowledge accessible to all students.
 - (c) demonstrates effective integration of a variety of resources and learning experiences into the curriculum.
 - (d) designs opportunities for students to apply, practice, and demonstrate knowledge and skills based on knowledge of learning modalities, style preferences, and intelligences.
 - (e) engages with colleagues and parents to collaboratively designs and implement necessary modifications and adaptations in instruction and curriculum so that students with disabilities have access to the general education curriculum in 1 restrictive environment.
- (3) The teacher communicates with and obtains feedback from students in a manner that enhances student learning and understanding.
- (a) engages students in explaining and/or demonstrating the relevance of topics and activities.
 - (b) involves students in establishing instructional direction and plans.
 - (c) establishes and states expectations for student performance.
 - (d) presents directions and explanations in a variety of ways to insure student understanding.
 - (e) engages students in the analysis and evaluation of their learning and adjusts instruction based on student feedback.
 - (f) communicates regularly with students about their progress.
- (4) The teacher comprehends and applies appropriately the Montessori Planes of Development principles for student growth, development and learning.
- (a) consistently integrates the use of cognitive thinking skills such as critical thinking, problem-solving, divergent thinking, inquiry, and decision-making into instruction.
 - (b) selects the most effective teaching techniques to address a variety of student learning levels, rates, styles and needs as well as diverse interests and backgrounds.
 - (c) selects the most effective Montessori materials and media to address a variety of student learning levels, rates, styles and needs.

- (d) integrates community resources, service agencies, other school personnel, parents, and community members as complement to the Montessori curriculum.
- (d) can articulate to students the interrelatedness of the disciplines.
- (5) The teacher appropriately utilizes a variety of teaching styles and resources which complement the Montessori curriculum for each area taught.
 - (a) designs and engages students in large group, small group, and independent work activities.
 - (b) demonstrates effective selection and use of a variety of methods to make knowledge accessible to all students.
 - (c) demonstrates effective integration of a variety of resources and learning experiences into the curriculum.
 - (d) designs opportunities for students to apply, practice, and demonstrate knowledge and skills based on knowledge of learning modalities, style preferences, and intelligences.
 - (e) engages with colleagues and parents to collaboratively designs and implement necessary modifications and adaptations in instruction and curriculum so that students with disabilities have access to the general education curriculum in the 1 restrictive environment.
- (6) The teacher manages the Montessori educational setting in a manner that promotes positive student behavior, and a safe and healthy environment.
 - (a) integrates the teaching of constructive, pro-social behaviors into instruction.
 - (b) establishes and teaches effective and efficient routines.
 - (c) engages students in establishing Montessori expectations for building a learning community in the Montessori classroom.
 - (d) maintains smoothness and momentum during instructional transitions.
 - (e) establishes an environment where Montessori curriculum materials and media are available and ready for student use.
 - (f) minimizes distractions and interruptions.
 - (g) uses a Montessori Classroom Management approach to promote acceptable and appropriate student behavior.
 - (h) identifies hazards, assesses risks and takes appropriate action.
- (7) The teacher recognizes student diversity and creates a Montessori atmosphere conducive to the promotion of positive student involvement and self-concept.
 - (a) adjusts practice based on observation and knowledge of students with disabilities and/or from culturally and linguistically diverse groups (e.g., Native Americans, Hispanic Americans, African Americans, Asian Americans, as well other recent immigrant groups).
 - (b) creates curriculum designs that include student performance and acknowledgment of

- achievement.
- (c) demonstrates an awareness of the influences of context disability, language, and culture on student learning.
 - (d) provides accommodations and interventions that allow each student to succeed based on individual learning needs.
 - (e) engages students in learning experiences that promote creativity, critical and divergent thinking.
 - (f) designs opportunities that require and reinforce student responsibility for learning.
 - (g) fosters the development of respect for individual, cultural, linguistic, disability, and religious differences.
 - (h) engages students in setting high standards for *performance*.
 - (i) treats all students equitably, recognizing and planning for individual differences in cultures, languages, learning abilities, backgrounds, and experiences.
- (8) The teacher demonstrates a willingness to examine and implement change according to Montessori standards.
- (a) demonstrates the ability to reason, take multiple perspectives, be creative, and take reasoned risks to improve teaching within the Montessori framework.
 - (b) collaborates with colleagues in the research of the Montessori Method to improve instructional strategies
 - (c) assumes a leadership role in the study and implementation of the Montessori curriculum for improvement and school reform initiatives.
- (9) The teacher works productively with colleagues, parents, and community members.
- (a) serves as a role model for broad working relations across the profession.
 - (b) demonstrates knowledge of specific school, family, and community resources that can support student learning.
 - (c) assists colleagues in the use of conflict resolution strategies.
 - (d) engages parents and community members productively in the work of the school.
 - (e) works collaboratively and creatively with colleagues, parents, and community members regarding educational matters.
- B. The Board may select additional Montessori standards and indicators determined appropriate to complete the local teacher performance evaluation system.
- C. The Board shall provide training in Montessori evaluation of *performance*, classroom observation techniques, conference skills, and growth planning to all teachers and personnel assigned *performance* evaluation duties.

Teacher Mentors

Teacher mentors will meet the qualifications as described in the “Position Description: Teacher

Mentor” as set fourth in the Employee Manuel.

Position Description: Montessori Teacher Mentor

Montessori Teacher Mentors are successful, highly experienced teachers who are mentors to other teachers. Montessori Teacher Mentors give guidance and support in the areas of curriculum implementation, classroom management and any other school related activity that will support the teacher into a successful transition into the school. The Montessori Teacher Mentor reports directly to the Principal. The position of Montessori Teacher Mentor also serves on the Board with a voting position.

Expectations for the Position of Montessori Teacher Mentor

Montessori Teacher Mentors must have either a Level 11 or Level 111 NM Teaching License and meet the criteria described within their level and area of certification. Montessori Teacher Mentors must be AMS Montessori certified at the classroom level they are mentoring.

Directly Responsible to: Principal

Qualifications

A level 2 or level 3 teacher license from the New Mexico Public Education Department or equivalent, as well as an AMS Montessori Teaching Certificate from a MACTE certified AMS Teacher Training Program.

Minimum Salary*

Teacher base salary and additional monies for mentoring will vary depending of the number of contact mentoring hours and the number of teachers mentored.

If the Mentor is not a school employee, the Mentor will be paid as a 1099 contractor and a fair price will be negotiated for the Mentor’s service.

Proposed Salary Support

Grants: Milken Family Foundation-The United Way-INTEL, NM

The SCS Board will investigate the possibility of applying the United Way, INTEL and the Milken Family Foundation Teacher Advancement Program as well as a compensation model to that of the SCS.

- As soon as the charter is approved the Interim Board Grant Committee will contact the NMCCS for additional grant opportunities.
- The Board feels these models incorporate an appropriate compensation model befitting a school of choice. It places a high value on responsibility and accountability as demonstrated by the employee rather than the traditional “pay commensurate with years on the job” model.
- It is the intent and philosophy of the Sage Charter School as a school of choice that employees of the school must be rewarded for personal investment of energy and commitment into the success of the program and the school. It is this model of compensation that supports the school’s goal of treating the parent and student as valued customers in the enterprise of public education.

The following proposed salary schedule stipulates a salary range depending on experience as well as responsibility and accountability. Teacher's Aides are non-licensed certified instructional support personnel while Teachers are all licensed and carry the responsibility of instructing a classroom. The Board shall collaborate with the Principal to define level qualifications and further develop the salary schedule.

Proposed Staff Salary

Proposed salary for year one See Appendix F.

Proposed Teacher-Pupil Ratio

Grades:	Kdg	20 -1 teacher	+1.0 aid	10.0-1
	1st-3rd	21-1 teacher	+1.0 aid	10.5-1
	4th-6th	24-1 teacher	+0.5 aid	1/2 12.0-1
	7th-8th	24-1 teacher	+0.5 aid	1/2 12.0-1
	9th-12th	24-1 teacher	+0.5 aid	1/2 12.0-1

F. STUDENT ENROLLMENT PROCEDURES AND DISCIPLINE POLICY

Enrollment Procedures

This section addresses the application requirements of NMAC 6.80.4.8 [12-14-01] Section P, Enrollment Procedures, including SCS' lottery process.

The Registration/Enrollment Process and Periods

Registration Process

SCS uses rolling registration/enrollment periods. School years are from July 1, through June 30. All registration periods for SCS are advertised in local publications, as well as, on the SCS website. In addition, at least one public meeting for purposes of providing information about the SCS registration process is held before a registration period begins. Parents interested in having their child enrolled at SCS may also request a personal appointment with the school Principal.

Registration Periods

SCS has at least one registration period per year. Registration is only opened if and when there are spaces *available* in each grade level and after all students on the waiting lists for that grade level has been admitted.

The first registration period each year

The first registration period is approximately 5 days in duration and is held in February of the year preceding the new school year. This registration period is advertised in local area media at least two weeks in advance of the registration period. At 5:00 p.m. of the 5th day, the first registration period closes.

The number of applicants admitted for the new school year will be determined by subtracting the number of continuing students (this does not apply in Year 1 of (SCS) from the number of available spaces for that grade according to the SCS charter.

If applicants, registration period 1 each year, are *less than or equal to available spaces* for each grade then these students will be notified that they have been admitted to SCS for the upcoming school year.

If the number of applicants in the first registration period *exceeds available spaces* for a given grade, a lottery process (described later in this Section) will be used to fill available spaces for that grade, as well as, place remaining students on a waiting list for that grade - *it is possible that a lottery may be required for only one grade or for multiple grades and NOT be required for the whole school.*

If a lottery process is required in this first registration period, a second registration period will not be held until all lottery students from the first registration have been admitted and, thereafter, spaces remain.

A *second registration period* will be held if after the completion of the first registration period there are available spaces in any grade level.

The dates for the second registration period shall be set by the SCS Board in an open meeting in or about March or early April for the next school year.

This registration period closes after the duration determined by the SCS Board and is evaluated against enrollment carryover from the previous school year (this does not apply in Year 1 of SCS), admissions to each grade from the first registration period, and the number of available spaces according to the SCS charter.

If registration numbers, for registration period 2 each year, are still *less than or equal to available spaces* for each grade, these students will be notified that they have been admitted to SCS for the upcoming school year.

If registration numbers, for registration period 2, *exceed available spaces* for a given grade, a lottery process (described later in this Section) will be used to fill available spaces in each grade level and to create a waiting list.

If after the second enrollment period, there are spaces available during the school year and prior to the first enrollment period each year; students will be admitted on a first come first serve basis.

Glossary:

Lottery Students	a student who is admitted through the lottery process.
Admitted Student	a student who has received a letter of admissions during any SCS registration period.
Applicant	a student who has completed the SCS admissions process, including forms, pre-placement assessments, etc., but whose admission is subject to available, grade-level, spaces.
Continuing Student	an existing student who has opted to return to SCS for the next school year.

Spaces Available shall be determined by subtracting the number of continuing students plus admitted students, from the number of *available* spaces for *each* grade as defined by SCS ' charter.

The Lottery Process

SCS assures that it will enroll students through a “lottery” selection process during registration periods held after applications for admissions exceed *spaces available* for any grade as described in the registration process in this Section.

Lotteries shall be held at an open meeting of the SCS Board, either a regularly scheduled meeting or a special meeting for any grade where applicants/registrants exceed *spaces available*. Notice of these meetings will be in compliance with the SCS Board’s open meeting notification policies.

Students are identified by a number given to parents at the time they apply. There is a blind container for each grade in which the applicant's numbers are deposited.

After each applicant's identification number is drawn from the blind container, the name is announced and recorded in the order drawn until all names have been drawn from each container. Spaces available are filled by the students in the order they are drawn from the container and, thereafter, a waiting list created from the remaining applicants in the order they are drawn, unless a parent/guardian requests that his/her student be removed from the list in writing.

Lottery students on a waiting list for admission to SCS are notified in writing by certified mail return receipt requested that they have been admitted to SCS for the upcoming school year. Each waiting list, lottery student will have 30 days to notify SCS that they will be attending SCS for the following school year. If no response is received after notification, SCS may fill that lottery student's space by the next student in line on the waiting list.

A student's position on a waiting list shall be by grade level and shall expire at the end of that academic school year.

Other policies of Admission:

Students who live in New Mexico may apply for admission through the SCS lottery process. Students who have been expelled or suspended from a New Mexico public or private school will not be eligible for admission.

Any student attending SCS is automatically admitted for subsequent school years based on their completion of an *Intent to Return Admissions* form and is defined as a continuing student. Siblings of SCS students are automatically admitted as space is available.

No preference for admission to SCS is given beyond continuation of enrollment for enrolled students and their siblings.

SCS does not charge tuition, have admission requirements, or state that it only accepts a certain population of students, except as otherwise provided in the Public Code.

The charter school notifies parents and the community about the charter's opening through newspapers, local circulations, and/or radio or TV.

Students are deemed registered when the following is completed and submitted to the registrar:

- Withdrawn slip from previous school
- Copy of immunization records
- Verification of original birth certificate
- Unofficial transcript
- Special Education information (if appropriate)
- Emergency contact information
- Health insurance information
- Lunch Form
- Release of information form
- School Registration Form

SCS operates as a non-sectarian, non-religious, public school and will comply with all applicable federal, state and local laws, rules and regulations including, without limitation, the constitutional provisions prohibiting discrimination on the basis of race, color, national and ethnic origin, disability, age, creed, gender, religion or ancestry. SCS does not charge tuition to any student.

Additional: Shortfalls

Just as any business/ school might find themselves in a “shortfall” at any time, our school Governing Body will have to determine how to adjust the budget to accommodate the situation.

The charter school is not allowed to incur debt-so it is “cut the budget to work” time. I would think that since we will be using a professional, financial management company, the Board will be kept currently informed and work with the Business Manager to anticipate and adjust the budget before hand.

Our contracts will reflect the fact that “Employment is contingent upon enrollment.” APS, our local district may not have this statement in their contract because of the union rules, but we will not be part of the collective bargaining plan and therefore not held to the same employee processes

Plan of Action in the event that enrollment goals are not met

Should initial enrollment goals not be met, we will develop a marketing plan and run additional sessions and lotteries.

- We will hire head teachers (beyond the head teacher) after sufficient students are enrolled in the school.
- The minimum number of students we would open with would depend on the rent of the facilities.
- If the SEG monies we would receive will not cover the bills for the required staff and facilities, then we would request an additional year to prepare for a successful opening of the school.

Student Discipline Policies and Procedures

As stated in the [6.11.2 NMAC].

See Appendix C for the complete Student Discipline Policies and Procedures.

Student Discipline Philosophy/Policy

SCS enforces a discipline system built around safety, structure, and choice and in compliance with the NMPED regulation NMAC 6.11.2.1 [11-20-00]. SCS has also substantially adopted the Student Behavior Handbook for the Albuquerque Public School, with some modification to fit the SCS Montessori Approach. The inherent diversity of school choice allows us to implement a wide variety and degree of structures to insure student safety while students learn that the behaviors outside school necessary in order for safety are not necessary or acceptable within the safety of the school. We believe that students can learn more than one set of roles dependent on the situation.

The discipline of SCS teaches students through structure which behaviors are acceptable. Ours is a discipline system that believes behavior must be learned. Similarly like academic learning, behavioral learning can only take place when the student is actively participating in school. Each staff member is committed to knowing why unacceptable behaviors occur, confronting those behaviors, teaching acceptable replacement behaviors through redirection and allowing the student the choice.

Our discipline system is designed to teach not to terminate. SCS’ proposed Student Behavior Policies are attached as Appendix C.

G. FACILITIES : school site has not been selected/secured

Location choices

Sage Charter School anticipates a similar demographic mix as is found in the location where the school will be located. We do recognize that Montessori is not necessarily known or appreciated to populations in the community where parents have no experience with the program. It is our vision that wherever we locate, we will attract stakeholders who wish a top notch, quality education for their children. Our quality and reputation will fill our school no matter where we locate.

To meet the school's educational plan, SCS will need to locate the school for easy access from any part of town by car or the bus. To attract our desired student population, we are currently investigating the areas of:

Central/Tramway,
Eubank/Menaul,
Alameda/San Pedro,
Candelaria/I-25,
Wyoming/I-40,
an Industrial Park near I-25/Princeton,
Industrial Park north of Osuna/west of Jefferson,
north of Alameda/west of I-25.-lots of vacant land.

We are also considering land near the Rail Runner's North Valley stop. We chose these locations because the demographics of these communities are economically and culturally diverse and fit out projected student profile as well as convenient access.

But we have to consider that areas where our target populations exist may be totally developed, or so pricy that we can't afford the property. We then may have to buy/ rent something like the old Albertson's at Menaul and Juan Tabo, or the old Western Warehouse at Montgomery and Juan Tabo.

Ideally the site will have 10 acres, but realistically we may only be able to afford 5. Our facilities team is also looking for land to be donated. Five acres will provide enough parent parking and playground space if need be.

Building plan options for use of space

Appendix L contains sample building plans from several school facilities. Ann Tekin, SCS board member, has original building plans for the school property at 3821 Singer NE which was built to exceed the Education Code Rating at the time. At its last renting, the K-6 Montessori School on Singer still met current building codes for an E rating,

We also have an architects drawing of a Montessori, 30,000+ sq ft building 7th -12th grade building that includes classrooms, gyms and other spaces for additional programs needed at these levels. The building is designed for 200 students and there are opportunities to create shared facilities with the elementary program, i.e. the gym, school offices, music room, etc.

Both of these building plans can be easily modified to fit other locations or building renovations. Together the floor plans offer more than 45,000 square feet of flexible design. We are happy to have this plans, because they will save money and design time.

We provide these samples to show our ability to design and build a school. (See Appendix L)

Plan to identify and secure an adequate facility

- SCS is in the process of locating a facility that complies with 22-8B-4.2.A. NMSA 1978.

- SCS understands that it must be located in a building that meets educational occupancy standards (E- code rating) required by the applicable New Mexico construction codes.
- SCS has formed a “building location committee” to find an appropriate site to meet the school’s specific program needs.
- Until the charter is approved, however, it cannot commit to any facility.
- SCS understands that prior to opening, it must demonstrate that its facilities meets the requirements of 22-8B-4.2A NMSA 1978; i.e. educational occupancy standards.
- SCS understands that the law will require the school to be housed in a public building or meet one of the exceptions described in 22-8B-4.2C NMSA 1978 before the charter will be renewed.
- Consequently, as part of the search for an appropriate facility, SCS will keep the requirements of 22-8B-4.2C NMSA 1978 in mind.
- SCS will, as part of the initial building location process, consider these “phase in” requirements (even though it is not required by law to comply with them until after it presents to the authorizer for renewal)
 1. Locate in a public building , or
 2. demonstrate that there is no public building available and
 3. find a private facility that meets statewide adequacy standards where the landlord will be contractually obligated to maintain those standards at no additional cost to the charter school; or
 4. locate in a building where the owner of the facility is a nonprofit entity specifically organized for the purpose of providing the facility to the charter school. The building must meet educational adequacy standards and the nonprofit organization must maintain those standards at no additional cost to the charter school.

Proposed site and building plan
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SCS is providing descriptions of two proposed sites it is interested in that meets the requirements of 22-8b-8O NMSA 2006.

Site 1. 4701 Wyoming Blvd., N.E. / 2.5 Acres or 108,900 Square Feet of Land 23,000 Square Foot Building/Demographics: 1 Mile, 3 Mile, 5 Mile (2006 Population): 17,712, 142,554, 278,275; (2006 Median HH Income): \$51,387, \$51,196, \$50,772 (Daytime/Employment): 6,620, 71,341, 188,618.

Site 2. 5801 Jefferson St., N.E./3.75 acres/46,000 square feet of SU-IP space would work well. Needs a bit of remodeling, level the concrete floors, add more windows.

SCS has not, however, signed a lease or other contract, because until the charter is approved it does not exist legally. Consequently, the founders cannot commit to the lease or a contract yet.

SCS is fortunate to have on its interim board the real Estate developer Ann Tekin. Her experience from developing property that housed the K-8 Montessori School on Singer Blvd for 25 years now provides SCS with her experience and the capability to get the job done well.

(See board members personal experience and abilities in section VII Governance/ Board Member Qualifications.)

Proposed capital outlay plan for facility and projected requests for assistance

SCS will not be applying for capital outlay monies at this time because we have not secured a property. Once approved, SCS will finalize the location and building according to our projected budget. If the property qualifies for capital outlay funds, the school will apply for the fund at that time. The facilities committee is also investigating the option available public building space.

H. OTHER STUDENT SERVICES

- **Transportation Policy**

It is not the intent of the SCS to provide students transportation to and from school, unless a student qualifies for transportation services per New Mexico State Board of Education (SBE) statute and NMPED regulation 6.43.4.8. As the local district currently does not possess the capacity to provide transportation for the SCS, SCS will negotiate a contract with a certified school transportation provider, should students enroll who require transportation services.

If available, SCS may also apply for transportation funds from NMPED. These funds will flow through the local District per statute. As SCS will be contracting for services independently and separately from the local District, SCS will assume and possess ALL liability for State transportation policy/procedural compliance, safety inspections, insurance coverage, driver certification, etc. SCS agrees to hold harmless the local district and PED.

At the time of this proposal, it is not the intention of the school to provide transportation to and from school. It will be the responsibility of the student and/or parent to transport the student to and from school. Parking will be available for students who drive their own vehicle to school. Regulations will be in place for students who drive to school.

SCS does not intend to negotiate with APS for bus services nor will SCS apply for state transportation funds unless special services are needed for special education students as specified in their IEP following standards for primary and secondary education transportation in 6.43.4 et al NMAC.

If SCS provides student transportation it will negotiate transportation services with Albuquerque Public Schools Transportation Department. Student transportation is provided for in Section 22.16.1 et seq., NMSA 1978. Monies allocated by the Transportation Unit of PED shall be utilized for transportation expenditures only and accounted for in accordance with PED transportation regulations and requirements following GAAP.

Regarding activity vehicles, SCS provides assurances that all employees who are utilized as activity drivers and are operating a school vehicle are in compliance with the requirements outlined in 6.41.4.13 E-F NMAC. Appropriate records are compiled and stored in the Business Office.

Further, SCS refers to “standards for providing transportation for eligible students” specified in 6.41.4 et al NMAC to ensure that procedures required by the PED are adhered to for all transportation services provided by SCS.

Student Transportation in Personal /Faculty Vehicles

Students will be strictly prohibited in riding in personal vehicles owned by SCS staff or faculty members unless staff or faculty is a parent or guardian.

- **Food Services Policy and Nutrition Education**

Overview: We will be a closed campus. Students bring their own lunch and snack.

School Lunch Program

It is not the intent of the SCS to provide daily lunches to students, unless a student qualifies for food services per New Mexico SBE statute. In such instances, SCS will contract and purchase products and nutritional snacks through a certified and local outsource lunch provider to the school.

But if SCS should find that student enrollment dictates the school needs to provide a food service, SCS follow food services standards as required by section 16.20.2.233-A NMAC. Food service funds are to be accounted for in the special revenue fund or the enterprise fund. All monies collected from the sale of food for the food service operation are to be accounted for in accordance with GAAP, U.S. Department of Agriculture (USDA) requirements, and Section 22.13.13, NMSA 1978.

SCS will provide vending machine services to students and staff for healthful and nutritional drinks and snacks following all rules and regulations for vending standards

- **Nutrition Education**

SCS will contact the PED Student Nutrition Program and comply with the state regulations and requirements. Nutrition Education will be presented to all students during their health unit in their science courses/subject matter. Students will learn the value of how to purchase and plan for well-balanced daily meals and pre-packed lunches

- **Counseling Services**

It is not the intent of the school to provide counseling services to students unless a student qualified for the service. If applicable, the school will contract out this service on an as need basis.

- **Health Services**

It is not the intent of the school to provide professional Health services to students unless the student is qualified for the services. The school will contract out this service on an as need basis.

VIII. REQUIREMENTS

A. LEGAL LIABILITY AND INSURANCE COVERAGE

Statement

The Sage Charter School and Board will participate in coverage by the Public School Insurance Authority and will comply with all applicable rules of that authority.

In accordance with the New Mexico Charter School Act of 1999, the PEC and the SCS hereby agrees that the PEC and the NMPED/CSD will assume no liability for the SCS and that the SCS can sue or be sued.

SCS will establish a working relationship with Poms and Associates' Insurance Brokers, Inc. to ensure that SCS is aware of and is in compliance with all issues regarding legal liability and applicable insurance coverage.

The Charter school agrees that it will not extend the faith and credit of the PEC or the NMPED.

B. WAIVERS

The following is a description of the waiters that the charter school is requesting from the NMPED and the NMPEC. Following the requested waiver is the charter school's plan for addressing these waivers.

1. Public School Code Waivers

Waiver Request

SCS Alternative: How Requirement is Addressed

Purchase of Instructional Materials 22-15-9

To receive instructional materials funding, 70% of instructional materials must be purchased from the state adopted materials list and 30% can be direct purchases off-list. **SCS requests 100% of elementary school instructional materials funding without having to meet the 70% requirement.**

SCS needs manipulative to implement its Montessori, Math and Science manipulative curriculum, which is not available from the state adopted materials list.

SCS requests a waiver, therefore, from NMSA 1978 - 22-8B-5B (1999) relating to the purchase of instructional material.

2. Public School Code Waivers

Waiver Request

SCS Alternative: How requirement is addressed

Staffing Patterns

Waiver requested:

SCS requests a waiver from NMSA 1978§22-10A-20.L. (2003). Teachers will be required to supervise lunch and recess and playground time, because this is required per Montessori educational curriculum.

Addressing waivers from the NMPED

SCS will request waivers from the New Mexico PED as applicable and wishes to reserve the right to request additional waivers from New Mexico PED policy, as may be identified and/or needed and agreed to by all parties.

SCS will apply for waivers on an as-needed basis to meet the goals and objectives with the mission and vision of the school. Waivers requested in the future will be requested in writing along with appropriate rationale for the waiver.

IX. APPENDICES / ACRONYM LIST

- Appendix A Scope and Sequence
- Appendix B Personnel Manual/Policies
- Appendix C Student Handbook including Student Discipline Policy;
- Appendix D Special Ed Manual DRAFT
- Appendix E Board By-laws
- Appendix F Salary Schedule
- Appendix G-1 910B-5 Form
- Appendix G-2 Proposed 5 year budget
- Appendix H John Hopkins University-National Network of Partnership Schools
- Appendix I American Montessori Society Affiliation Handbook 2004
- Appendix J Montessori Applied to Children at High Risk, Joyce S Pickering
- Appendix K New Graduation Requirements for NM 2009
- Appendix L Sample Building Plans
- Appendix M Montessori Accreditation Council for Teacher (MACTE)
- Appendix N SMART Goals

ACRONYM LIST

ALS	Alternative Language Services
AMS	American Montessori Society
AMI	Association Montessori International
APS	Albuquerque Public Schools
AYP	Adequate Yearly Progress
BAR	Budget Adjustment Request
COBRA	Health Benefits Under Consolidated Omnibus Reconciliation Act
CPA	Certified Public Accountant
DFA	Department of Finance and Administration
EAP	Employee Assistance Program
EC	Executive Committee
ELL	English Language Learner
EPSS	Educational Plan for Student Success
ESE	Exceptional Student Education
ESL	English as a Second Language
FAPE	Free Appropriate Public Education
FERPA	Family Education right and Privacy Act
FLMA	Family Medical Leave Act
FMS	Financial Management System
FRPL	Free and Reduced-Price Lunch

FTE's	Full-time Equivalents
GAAP	Generally Accepted Accounting Principals
GASB	Governmental Accounting Standards Board
HIPPA	Health Insurance Portability and Accountability Act
IDEA	Individuals With Disabilities Education Act
IEP	Individualized Education Program
LEA	Local Education Agency
LEP	Limited English Proficient
LRE	Least Restrictive Environment
MACTE	Montessori Accreditation Council for Teacher Education
MAP	Measures of Academic Progress
MMM	Montessori Made Manageable, Inc.
NAMTA	North American Montessori Teacher Association
NCLB	No Child Left Behind
NMAA	New Mexico Alternative Assessment
NMHSCE	New Mexico High School Competency Exam
NMPED	New Mexico Public Education Department
NMPSIA	New Mexico Public Insurance Authority
ONB	Office of Management and Budget
P.T.O.	Parent Teacher Organization
PEC	Public Education Commission
PEP	Personal Education Plan
PSIA	Public School Insurance Authority
PTC	Parent Teacher Committee
RN	Registered Nurse
S.T.A.R.S.	Student Teacher Accountability Reporting System
S.W. O.T.	Straight, Weakness, Opportunities, Threats
SBA	Standard Based Assessments (The Plan)
SBE	State Board Education
SCS	Sage Charter School
SDE	Special Development Expenditures
SEG	State Equalization Guarantee
SEM	Special Education Manual
SPS	Student Performance Standards
SRA	Special Review Assessment
TBA	To Be Determined
TESOL	Teachers of English to Speakers of Other Languages
WRI	Work Related Injury