

**Oregon Public Charter School Incentive Grant
Application Cover Page
Attachment A**

Name of Proposed Charter School: **Community Roots Montessori**_____

Local School District: **Silver Falls School District**_____

Superintendent of Local School District: **Craig Roessler**_____

County: **Marion**_____

Project Director: Jennifer de Jong	
Address: 340 Norway St, Silverton OR 97381	
Phone: 503.873.0691	e-mail: jeffandjen5@verizon.net
Fax: none	

Fiscal Agent: (School District) Silver Falls School District	Contact Name: Craig Roessler
Address: 1456 Pine St, Silverton, OR 97381	
Phone: 503.873.5303	e-mail roessler_craig@silverfalls.k12.or.us
Fax: 503.873.2939	

Phase	Year	Projected Enrollment	Grades	Projected Grant Request
One: Planning	2008	0	0	\$50,000
Two: Implementation	2009	40	K-3	\$165,000
Three: Cont'd Implementation	2010	57	K-4	152,500

Community Roots Montessori

Silver Falls School District

Please list names and addresses of the individuals involved in the planning of the proposed charter school.

1. Jennifer de Jong, 340 Norway St, Silverton, OR 97381
2. Jennifer Traeger, 915 Todd Ct, Silverton OR 97381
3. Jennifer Kimball, 306 Mill, Silverton OR 97381
4. Bart Banks, 1006 Pine, Silverton OR 97381
5. Amanda Petrik, 216 James, Silverton OR 97381
6. Adrienne Happy, 1125 S Water, Silverton OR 97381
7. Chris and Jillian Kelly, 410 Gilles, Mt Angel OR 97362

Charter School Developer(s) Signatures

Date

Assurances Signature Page Attachment B

Charter schools/district partnership(s) that accept funding through the Oregon Charter School Grant Program agree to the following assurances:

1. An assurance the applicant will annually, for the life of the charter, provide the U.S. Secretary of Education and the Oregon Department of Education such information as may be required to determine if the charter school is making satisfactory progress toward achieving the funded activities. This includes participation in any federal or state funded charter school evaluations or studies.
2. An assurance the applicant will cooperate with the U.S. Secretary of Education and the Oregon Department of Education in evaluating the program being assisted.
3. An assurance that the school is nonsectarian in its programs, admissions policies, and employment practices.
4. An assurance the school complies with the Age Discrimination Act of 1975, Title VI of the Civil Rights Act of 1964, Title IX of the Education Amendments of 1972, section 504 of the Rehabilitation Act of 1973, and Part B of the Individuals with Disabilities Education Act.
5. An assurance the school agrees to comply with the same Federal and State audit requirements, as do other public schools in the State and that arrangements have been made to finance those mandatory audits.
6. An assurance the school meets all applicable Federal, State, and local health and safety requirements.
7. An assurance the school operates in accordance with applicable State law.
8. An assurance the school's admission process will not discriminate against anyone regarding race, gender, national origin, color, disability or age.
9. An assurance that the school will admit students on the basis of a lottery, if more students apply than can be accommodated.
10. An assurance the grantee shall maintain accounting records and other evidence pertaining to costs incurred, with the provision that the records shall be kept available by the grantee during the grant period and thereafter for three full years from the date of final payment. ODE must be permitted to audit, review, and inspect the grantee's activities, books, documents, papers and records relating to the expenditures of grant proceeds during the period of the grant and for three years following final payment.
11. An assurance modifications and/or changes to the budget will meet the approval of the Project Director.
12. An assurance the awarded grant funds will be spent or encumbered by July 31, 2008 unless an extension is requested by March 1, 2008.
13. An assurance the charter school has provided the school district with "adequate and timely notice" of the grant application.

It is the responsibility of each local charter school and school district that receives funds under this grant to comply with all required federal assurances. Funded sites will be expected to cooperate with the Department in the development and submission of certain reports to meet certain state and federal guidelines and requirements. All grantees are required to provide requested data to ODE's contractor for the charter school evaluation study.

In addition, funded projects will be required to maintain appropriate fiscal and program records. Fiscal audits of funds under this program are to be conducted by the recipient agencies annually as a part of their regular audit. Auditors should be aware of the Federal audit requirements contained in the Single Audit Act of 1984.

IF ANY FINDINGS OF MISUSE OF FUNDS ARE DISCOVERED, PROJECT FUNDS MUST BE RETURNED TO THE OREGON DEPARTMENT OF EDUCATION. The Oregon Department of Education may terminate a grant award upon thirty (30) days notice if it is deemed by the Oregon Department of Education that the applicant is not fulfilling the funded program as specified in the approved project application.

Grant recipients will be required to keep and maintain all equipment purchased with grant funds in accordance with the requirements of federal law and regulation. Should the charter school close, for any reason, the school district agrees to contact the Oregon Department of Education regarding assets purchased by this grant.

Charter School Representative Signature

Date

School District Representative Signature

Date

(School District Representative Signature does not bind or commit the School District Board to approve a proposal or award a charter.)

OR

Date charter school incentive grant was delivered or sent to School District Representative

Community Roots Montessori- Oregon Public Charter School **Incentive Grant**

1. Abstract of Project and Project Goals

Mission statement: *We respect each child as an individual and support freedom and responsibility in their academic experience. We strive to use Dr. Maria Montessori's methods to provide a learning environment that allows each child to work at their own developmental level, to observe and learn in peaceful, multi-age classrooms, and to increase their knowledge and intellect at their own pace. Faithful to the heritage of the Montessori vision, our mission is to provide students with a traditional Montessori education within a public school setting.*

Community Roots will follow the Montessori philosophy and methods. Montessori is an internationally known system of education which is familiar and appealing to a wide range of parents and students. Community Roots Montessori began due to the growing local interest in the Montessori philosophy. In the last year, there have been two attempts to start private Montessori preschools in Silverton. Though these efforts did not come to fruition, it was not due to a lack of interest within the community. Our research has shown that parents in this community believe that a Montessori education should be available to all children, not just those who can afford a tuition-based education. We plan to begin with grades K-3 (total of 40 FTE) and add an additional grade each year, until we serve K-8 (up to 270 FTE). Each class will hold up to 30 students, dependent on the enrollment. There has been an overwhelming interest in this school and it will be imperative to the success of Community Roots that the school progress and evolve slowly with a solid educational program and high quality teachers.

B. Project Goals

1. Establish a non-profit corporation, as measured by creating and filing Oregon Corporate documents and applying for 501(c)(3) tax-exempt status. (May 2008-September 2008)
2. Recruit highly qualified staff, as measured by job announcements on Montessori-oriented web sites and postings. (May 2008-June 2009)
3. Train qualified staff, as measured by professional development opportunities (such as training, workshops and conferences) which will prepare teachers and assistants for an academic program which meets both Oregon and Montessori standards. (July 2008-September 2009)
4. Outreach to the community and wide visibility, as measured by public meetings, flyer distribution, publicity in the local media, e-mail lists, a web site (crmontessori.org) and advertising. This outreach will include an extensive effort to connect with the at-risk and minority children in our community by meeting with local minority group leaders and translating all PR and parent materials into Spanish. (May 2008-ongoing)
5. Develop a basis for a quality Montessori program, as measured by documentation of research and guidance from Montessorian sources as well as the completion of the Community Roots charter. This information will relate to the essential classroom materials and other best practices. Contracts with the consulting firms Charter Starters and Montessori Made Manageable to help ensure our success. (May 2008-September 2009)

6. Locate and secure a facility, as measured by ongoing work with the school district and other private and public entities, including real estate brokers. Discussions with the Silver Falls School District have suggested a strong possibility that classroom space will be available in a District building. (May 2008-May 2009)

7. Establish and foster a relationship with the Silver Falls School District School Board, as measured by attendance at board meetings and meeting individually with board members. (May 2008-ongoing)

8. Recruit a board of directors, as measured by outreach and announcements to the broad community, elections and a vote. (May 2008-September 2008)

9. Community Roots academic scores in math and reading, as measured by the Oregon Assessment of Knowledge and Skills, will meet or exceed the scores of the other elementary schools in the Silver Falls School District. Current academic scores in the Silver Falls School District report that 86% of students in 3rd grade met reading standards and 70% of students in 3rd grade met math standards. (September 2009-June 2010)

2. Purpose of School

Community Roots Montessori will be consistent with all of the goals outlined in ORS 338.015. Community Roots will focus on *B. Increase choices of learning opportunities for students*. The Silver Falls School District does not currently include any classrooms which use a Montessori curriculum. Eleven families in Silverton currently send their children to a private Montessori school in Molalla (20 miles north). Online and phone surveys, community meetings, and public announcements have indicated a large interest for Montessori education in our area.

The option of a Montessori school will mean opportunities for a diversified approach to learning. For example, the Montessori method uses multi-aged classroom grouping, a 3-hour work period, and a prepared environment with material designed specifically for the Montessori classroom. These arrangements encourage cooperation, provide opportunities for indirect learning for younger students, foster self-confidence in students who serve as role models and provide long term teacher-student relationships. The Silver Falls School District does not currently include a school that utilizes the Montessori approach. Opening the Community Roots Montessori will increase the choices of learning opportunities for students in the greater Silverton area. Silverton is a progressive community with many families interested in educational options.

Demographics/Need

A. Silverton is a community of over 9,000 residents with a significant population living in rural areas. Since 2000, there has been more than 25% growth in the population of Silverton. 62.9% of Silverton households earned less than \$50,000/year and 84.9% earned less than \$75,000/year. 11.6% reported themselves to be Hispanic or Latino, regardless of race.

There are eleven elementary schools in the Silver Falls School District. Nine of the schools typically serve rural populations and two of the schools serve the families who live in town (Eugene Field grades K-3 and Robert Frost grades 4-6).

B. There are 3,604 students in the district and 35% of those students receive free or reduced cost lunch. 10% of the students are ESL and 15% of the students are minorities. Outreach to local groups such as Somos Hispanas Unidas and the

Silverton Head Start program will allow our school community to reflect the diversity of our area. Community Roots Montessori is committed to reaching out to, serving, and eliminating achievement disparity in children from lower socioeconomic statuses or children who come from a minority racial or ethnic heritage. The lottery requirement for admissions will further ensure equal access to Community Roots.

- C. Silver Falls School District has one charter school, Bethany Charter - with a focus on science and technology. We envision our school as a part of the continuum of options available in the school district – as one choice which would facilitate educational success for students. Silverton does not currently offer a school with Montessori teaching methods and Community Roots would fill this gap. There is a strong desire of the families in this area to have a Montessori option available to all residents, not just those with enough income to pay for this type of education. We expect further outreach to nearby towns of Mt Angel, Scotts Mills, and Monitor increase this number.

Telephone and on-line surveys and community outreach indicate that there are more than 50 families interested in Community Roots Montessori. The data collected demonstrates that we have enough interested and committed families to fill and exceed 40 FTE spots.

4. Parent and Community Support

- A. The founding team working on the design and implementation of the school currently includes 11 members. This founding team conducted telephone and online surveys and held a community meeting to determine the needs of

Silverton and the surrounding areas. From the surveys and community meeting we learned that there is a strong desire to have this option in our town, and approximately 40 additional parents are asking to be directly involved in the planning of the school. Our team members include parents, public school teachers (one of which is bilingual in Spanish), a teacher in the final stages of primary Montessori certification, a non-profit organizer/grant writer, a technical writer, a financial planner and a small business owner. This team is and will be involved in the design of the school by creating the school's mission statement; writing the charter; establishing a board of directors; recruiting, teachers and administrators; acting as liaisons with the school district; creating the schools initial budget; community outreach; researching and acquiring the curriculum; and finding a location for the school. We will also contract with the consultant groups Charter Starter and Making Montessori Manageable.

This team has committed to be involved in the ongoing operations of Community Roots School in parent organizations, fund raising activities and volunteer duties.

B. Initially, the board of directors will be recruited by the Community Roots founders.

The five to seven member board will be representative of parents, school district representatives, local business leaders, educators and community activists.

Board member positions will be on staggered two- or three-year terms, with elections held annually. Board members will have the primary responsibility for fulfillment of the school's mission and be legally accountable for its operations.

The board will select, evaluate and work with staff, amend bylaws, manage

fundraising, and approve annual budgets and major expenditures. The board will conduct regular, monthly meetings.

5. Education Program

A. Montessori education was founded in 1907 by Dr. Maria Montessori. She based her educational methods on scientific observation of children's learning processes. Guided by her finding that children discover knowledge themselves, Dr. Montessori designed a "prepared environment" in which children could freely choose from a number of developmentally appropriate activities. A century later, Montessori education is found all over the world, spanning ages from birth to adolescence. The following are the specific details of the Montessori method as adapted with permission from *The Joyful Child*, by Michale Olaf.

- The three-hour work period: Age five to six, there are one or two 3-hour, uninterrupted, work periods each day, not broken up by required group lessons. Older children work together in cooperative meetings or study groups with teacher involvement where necessary or when requested by the students. Adults and children respect concentration and are expected to practice managing their behavior to honor fellow student's concentration on their work. Groups form spontaneously or are arranged ahead by special appointment.
- Multi-age grouping: Children are grouped in mixed ages and abilities in all classrooms: Kinderhaus, lower elementary, upper elementary and middle school. Problem solving, child to child teaching, and socialization is highly encouraged. Children are challenged according to their ability and never bored.

- **Materials:** Materials are displayed on low, accessible shelves in a simple and attractive manner that calls to the child. They are as *beautiful* as possible, in good condition, and where appropriate, color coordinated so that the child has no confusion about what goes with what. For example, colored drawing pencils are stored and presented in canisters painted the same color as the pencils themselves. This encourages and directs children to be self-sufficient in learning to properly and responsibly return materials when finished. The materials present a concept *concretely*. For instance, when the concepts of units, tens, hundreds, and thousands are presented in mathematics, small beads are used for units. Ten units are then strung together on a wire to make a "ten," ten wires are put together to make a "hundred," and ten hundred-squares are wired together to make a "thousand." As the child grows and develops, materials s/he uses become more abstract, until the child has moved from the graded groupings of strung beads manipulated on trays and mats to the complete abstraction of numerals written on paper. Each material isolates a particular challenge, teaching a particular skill. This means that the child has a greater chance for success in understanding the educational concept, thereby enhancing a positive self-image and encouraging the love of learning. Once an activity has been mastered, the child can proceed to an advanced material. Materials are, furthermore, self-correcting wherever possible.
- **Teaching method - "Teach by teaching, not by correcting":** There are no papers turned back with red marks or corrections. Instead the child's effort and work is respected as it is. The teacher, through extensive observation and record-

keeping, plans individual projects to enable each child to learn what s/he needs in order to develop.

- Teaching ratio: The teaching ratio is one trained Montessori teacher and one non-teaching aide to 30+ children. Rather than lecturing to groups of children, the teacher is trained to teach one child at a time, and to simultaneously oversee thirty or more children working on a broad array of tasks. S/he is educated in the basic lessons of math, language, the arts and sciences; and in guiding a child's own research and exploration, capitalizing on his or her interest in and excitement about a subject.
- Basic lessons: The Montessori teacher spends a lot of time during teacher training practicing the many lessons with each Montessori material. S/he must pass a written and oral exam on these lessons in order to be certified. S/he is trained to recognize a child's readiness considering age, ability and interest in a specific lesson, and is prepared to guide individual progress.
- Areas of study: All subjects are interwoven rather than isolated and the teacher models a person of broad interests for the children. A child can work on any material s/he understands at any time. At any one time in a day all subjects, at all levels -- math, language, science, history, geography, art, music, etc., are available to be studied.
- Character education: Education of character is considered equally valuable with academic education. Children learn to care for themselves, their

environment and each other through cooking, cleaning, building, gardening, moving gracefully, speaking politely, being considerate and helpful, doing social work in the community, etc.

- Teacher: The Montessori teacher remains alert to the interests of each child and facilitates individual research in their interests. The only curriculum requirements are those set by the state. From age six on, students design contracts with the teacher to guide their required work, to balance their general work, and to teach them to become responsible for their own time management and education. The work of the 6+ class includes subjects usually not introduced until high school or college.

Significant research has been conducted to determine the developmental outcomes of Montessori taught children. A longitudinal study of the experience in the Milwaukee Public Schools supports the hypothesis that Montessori education has a positive long-term impact (Alan Gartner, PhD, and Dorothy Kerzner Lipsky, PhD, 2003, *Outcomes for Students in a Montessori Program*) A significant finding in this study is the association between a Montessori education and superior performance on the Math and Science scales of the ACT and WKCE. In essence, attending a Montessori program from the approximate ages of three to eleven predicts significantly higher mathematics and science standardized test scores in high school.

B. The curriculum of Community Roots Montessori will align with the benchmarks and performance standards set by the Oregon Department of Education in all areas. Students will participate in all state administered tests.

- C. Community Roots will contract with Montessori Made Manageable (MMM), an organization with over a decade of experience aligning Montessori curricula and state standards. MMM will work with Community Roots to furnish the school with practical, creative, and organized curriculum management tools. This will allow Community Roots to spend more time on the child, providing techniques and tools for running a more efficient Montessori curriculum within state standards.
- D. Classroom structure and instructional methods are described in detail in 5.A above. The environment is purposefully designed to cater to what Dr. Montessori called the child's "sensitive periods," times in the child's life when s/he is particularly receptive to certain aspects of the environment or the acquisition of particular skills. Montessorians further believe every child must be respected for his/her individuality, and the educational environment must be designed to encourage respect of each child's differences.

The classroom environment is painstakingly prepared and the Montessori teacher acts as the link between the child and this environment. Overall, the child's main work is to become a productive adult. Once shown how to conduct an activity, the child is free to choose and to repeat it as often as s/he wants. This freedom helps the child develop a love of learning, respect for her/himself and others, and a healthy self-confidence. The child also develops a sense of inner discipline from having to direct her/his own movements. Each child works at his or her own pace, with the child's own developmental level setting the only ceiling on achievement.

6. Accountability

A. Accountability plan. Community Roots will be accountable in two main areas. First, we will be accountable to families through two annual parent-teacher conferences and quarterly progress reports. Second, Community Roots will be accountable to Silver Falls School District and the Oregon Department of Education. The Community Roots charter will specify the school's obligations. As a public school, our obligations include compliance with a range of laws and regulations as well as an obligation to facilitate the achievement of results for our students. Community Roots will assume the responsibility of setting goals and gathering and reporting data related to those goals. Community Roots recognizes that an accountability plan is an imperative tool in the evaluation of our effectiveness. Visible results of student achievement and behavior will solidify Community Roots as a successful public school

B. Current academic scores in the Silver Falls School District report that 86% of students in 3rd grade met reading standards and 70% of students in 3rd grade met math standards. Community Roots will meet or exceed these academic scores in reading and exceed scores in math, as measured by the Oregon Assessment of Knowledge and Skills.

As a second goal, Community Roots will develop a system of assessment that draws on the evaluation system that Montessori teachers naturally employ.

We expect at least 80% of our students to meet or exceed documented learning objectives at the conclusion of the kindergarten year, third grade year, fifth grade

year and the eighth grade year. These grade levels mark the end of the three-year work cycles in which students will be engaged.

Specific objectives will be written in the areas of mathematics, language arts, cultural studies (science and humanities), critical thinking, creative problem solving, and personal and social development (including self-motivation, self-reliance, and respect for the prepared environment).

These objectives are modeled on the River Valley Charter School in Massachusetts. River Valley has created a comprehensive assessment system that relies heavily on existing Montessori practices of highly detailed and frequent observation and recording on the part of teachers. This system also aligns with Oregon state standards.

Our aim is to create a set of customized tools (by June of 2009), modeled on River Valley's, that provide valid and credible data on student performance within each of our documented learning objectives. Tools will include: guidelines for teachers in observing student work, tools for recording progress, tools for setting student goals, portfolio development (including both process and best work) and progress reporting. Teachers will use the collective evidence provided by observations, portfolios and progress reports to determine whether a student has met or exceed the learning objectives at the end of a three-year work cycle.

7. Staffing

- A. Each classroom will be staffed with one trained Montessori teacher, licensed through the State of Oregon. Additionally, each classroom will have a full-time assistant. Given the small size of our school initially, there may be opportunities for

administration to be done on a part-time basis, following Silver Falls School District's staffing model. Teacher to pupil staffing will have to be adjusted to reflect the fact that each classroom will have a full-time assistant. Non-teaching staff will be coordinated with the school district for such things as counseling, a school nurse or janitor.

B. Classroom teachers will be responsible for the classroom preparation, academic achievement and progress, as well as daily documentation and communication with parents. Each teacher will be expected to aid each child as they continue to grow and broaden as an individual. Teachers and assistants will be committed and passionate about the Montessori approach and the opportunity to bring this education to a diverse group of children. The administrator will be responsible for the overall administrative functioning of the school. S/he will also foster the Montessori practices of our school in a supportive community that values innovative education, family, and most of all, children. The administrator will have a passion for the work of Dr. Maria Montessori and a well-rounded perspective as a school leader merging a public school with the Montessori philosophy.

C. In order to serve students well, teachers, administrators and other professional staff will be given every possible opportunity for professional and personal development. Professional development days will coincide with the local school district calendar.

A portion of each year's professional development funds will be earmarked to provide: 1) Montessori consultants and professional speakers to come to the school and work with the teachers, administrators, and other staff, 2) Substitute

coverage and/or conference or course reimbursement for Montessori or other professional training, 3) Financial assistance and/or release time to pursue course work leading to Montessori or MA state teaching certification, or 4) Substitute coverage so staff can share best practices with other schools through conference presentations, professional writing and or/ consultations.

The Community Roots library will have and make available to all teachers, administrators, and other school staff, copies of all the major writings of Dr. Montessori and other recognized professionals in the field of Montessori education, as well as Montessori magazines and other important education journals. The school will post, on the staff bulletin board, all notifications of seminars, workshops, lectures and conferences pertaining to Montessori or other educational information.

8. Project Budget Narrative (Plus Attachments C, D, & E)

- A. Overview: Community Roots \$367,500.00 grant request will be principally delegated for the detailed start-up services (legal structure, consulting), supplies and materials (classroom materials), curriculum development, staff recruitment and training, equipment and facilities. Specific goals, as outlined in 1-6 in section 1.B above, will be met with the grant funds. Goals 7-9 will be supported by the use of these funds for those six specific goals.
- B. Planning phase: In stage 1, Community Roots will use grant funds to conduct community outreach, legal and consulting fees, training and curriculum development, charter development and staff recruiting. Community Roots would use 32% (\$8,000) of the funds to establish the non-profit corporation, 28% (\$7,000) to provide staff with training and education and another 24% (\$6,000) for

curriculum and charter development. This will be a critical component of the planning phase. The remaining 16% (\$4,000) will be used for recruiting, community outreach, administration and membership fees. In stage 2, Community Roots is requesting to use 44% (\$11,000) of the grant funds for continued charter and curriculum development, 34% (\$8,500) for continued professional development of newly hired staff, 20% (\$5,000) for the administrative set-up and operations of the school, and the remaining 2% (\$500) for continued community outreach.

Phase two, Implementation phase: Community Roots is requesting to use 41% (\$67,500) of the funds to outfit two classrooms with Montessori materials, audio-visual equipment and computers. 21% (\$35,000) of the funds would be used for furniture and other equipments, 18% (\$30,000) for ongoing professional and curriculum developments, 12% (\$20,000) for community outreach and marketing (including translations), and the remaining 8% (\$12,500) for potential renovations and upgrades to the facility.

Phase three, Continued implementation phase: Grant funds will be used to furnish an additional classrooms at 38% (\$57,500), 26% (\$40,000) for additional supplies and equipment, and certification and training of an additional teachers at 20% (\$30,000). Additional funds would be used for marketing and outreach at 6% (\$10,000) and the remaining 10% (\$15,000) would be used for minor renovations and upgrades to the facility.

Please see attachments C, D and E.

9. Business Capacity/Continued Operation

- A. Community Root's business practices will comply with federal and state mandates, local district guidelines and *generally accepted accounting practices* for non-profits and public schools. The school board will develop a balanced operating budget to be approved by the school district board as a part of the annual budgetary process. Community Roots will hire an accountant to develop, implement and maintain all accounting systems and policies in a sound and defensible manner. Community Roots will look to other charter schools for models and best practices in charter school office polices and practices.
- B. See attachment F.
- C. Based on a public survey and a community meeting, there are more than 50 families who have expressed an interest in Community Roots (not including the founding members). We believe that it will be necessary to implement the lottery system in just the first year of enrollment. We chose to grow at a slow pace in order to ensure a strong foundation for the school's operational policies and procedures as well as the development of highly qualified staff, sound curriculum development and adequate assessment of Community Root's achievements.

10. Priority

- A. Community Roots is committed to reaching out to the at-risk children in our community. For example, in an effort to reach out to the Hispanic community, Community Roots will strive to establish a partnership with Somos Hispanas Unidas, a local, non-profit Hispanic women's group. Additionally, Maria Montessori's original approach to education was developed by working with at-risk children in the low income areas of Italy. The model is designed to develop

the skills and knowledge that *many types of learners* need to succeed in life. In recent years, public Montessori schools have shown strong student performance for diverse student populations, including at risk students and talented. The Montessori model offers a number of strategies that are effective in educating students at risk for school failure as well as opportunities that are recognized as addressing the underserved needs of high-achieving, talented and gifted children. Within a systematically structured learning environment, the curriculum incorporates detailed task analysis and the presentation of concepts ranging from the concrete to abstract that are of high interest to the child and individualized: All within a classroom design that prioritizes opportunities for hands-on and multi-sensory learning.

B. Currently there are no tuition free Montessori schools in the Silverton area. There are private Montessori schools in neighboring towns; however a private school is not feasible for many Silverton residents, especially those at-risk or at lower income levels. None of the elementary programs in the Silver Falls School District have been identified for improvement, corrective action or restructuring. Community Roots proposes that the Montessori approach to education will provide options for children who may not learn best in a traditional classroom setting.

Attachment C
Budget Worksheet
Community Roots Montessori

Planning Phase Stage 1

Planning funds may be used for: a)Planning and design of educational programs, b)Professional development of staff and c)Development of charter application

Budget Categories:

- 1) Salaries
- 2) Benefits
- 3) Purchased Services
- 4) Supplies and Materials

Description and Timeline of Activity	Estimated Expense (Budget Category)	Total Request
<p>Establish a non-profit corporation. Costs will include accountant and legal fees.</p> <p>Target date: September 2008</p>	<p>1.</p> <p>2.</p> <p>3. \$8,000</p> <p>4.</p>	<p>\$8,000</p>
<p>Recruitment of staff. Costs include advertising and the cost of materials and consulting.</p> <p>Target date: June 2009</p>	<p>1.</p> <p>2.</p> <p>3. \$500</p> <p>4. \$500</p>	<p>\$1,000</p>
<p>Professional development. Costs include training, workshops and conferences to prepare teachers and assistants.</p> <p>Target date: September 2009</p>	<p>1.</p> <p>2.</p> <p>3. \$7,000</p> <p>4.</p>	<p>\$7,000</p>
<p>Community outreach. Costs include flyers, publications, advertising and facilities for community meetings.</p> <p>Target Date: September 2009</p>	<p>1.</p> <p>2.</p> <p>3.</p> <p>4.\$1,000</p>	<p>\$1,000</p>

Description and Timeline of Activity	Estimated Expense Budget Category	Total Request
Curriculum and charter development. Costs include research and consulting fees. Target date: May 2009	1. 2. 3. \$6,000 4.	\$6,000
National Association for Charter Authorizers (NACSA) membership for local school district		\$1,000
Administrative Costs		<u>\$1,000</u>

Planning Grant Phase 1 Total Request \$25,000

Attachment C
Budget Worksheet
Community Roots Montessori

Planning Phase Stage 2

Planning funds may be used for: a)Planning and design of educational programs, b)Professional development of staff and c)Development of charter document/agreement

Budget Categories:

- 1) Salaries
- 2) Benefits
- 3) Purchased Services
- 4) Supplies and Materials

Description and Timeline of Activity	Estimated Expense (Budget Category)	Total Request
Professional development (continued). Costs include training, workshops and conferences to prepare teachers and assistants. Target date: September 2009	1. 2. 3. \$8,500 4.	\$8,500
Community outreach (continued). Costs include flyers, publications, advertising and facilities for community meetings. Target Date: September 2009	1. 2. 3. \$500 4.	\$500
Curriculum and charter development (continued). Costs include consulting fees. Target date: May 2009	1. 2. 3. \$11,000 4.	\$11,000
Development of the school operations. Costs include consultant fees and project director stipend. Target date: June 2009	1. 2. 3. \$5,000 4.	\$5,000

Phase I (Planning Stage 2) Budget Worksheet
 Attachment C, continued

Description and Timeline of Activity	Estimated Expense Budget Category	Total Request
Administrative Costs		\$ included above

Planning Grant Phase 2 Total Request \$25,000

Phase Two, Implementation Budget Worksheet
Attachment D
Community Roots Montessori

Budget Calculation

\$125,000 + (Projected Number of Students 40 x \$1000) = \$165,000
 Base Allotment + the product of the projected number of students x \$1000 per pupil allotment = Total Phase 2 allocation
 (may not exceed \$225,000)

Implementation and Continued Implementation funds may be used for:

- a). Professional development of teachers and staff who will work in the charter school
- b). Development and dissemination of materials informing the community of the charter school
- c). Purchase of equipment and educational materials
- d). Development of curriculum materials
- e). Other initial operating costs that cannot be met from state or local sources

Budget Categories:

1. Salaries
2. Benefits
3. Purchased Services
4. Supplies and Materials
5. Capital Equipment

Description and Timeline of Activity	Estimated Expense (Budget Category)	Total Request
<p>Professional development/curriculum. Training, workshops and conferences on charter schools, Montessori education and other relevant topics. September 2009-May 2010</p>	<ol style="list-style-type: none"> 1. 2. 3. \$30,000 4. 5. 	<p>\$30,000</p>
<p>Marketing/community outreach. Website maintenance, outreach activities, informational meetings, student enrollment, admissions, including lottery, brochures and other materials (printing and postage). July 2009-June 2010</p>	<ol style="list-style-type: none"> 1. 2. 3. \$10,000 4. \$10,000 5. 	<p>\$20,000</p>

Description and Timeline of Activity	Estimated Expense (Budget Category)	Total Request
Instructional equipment. Materials for grades K-3, including computers and audio-visual equipment (two classrooms). June 2009-September 2009	1. 2. 3. 4. \$67,500 5.	\$67,500
Supplies and equipment. Furniture and other items such as copy machines and office equipment. June 2009-September 2009	1. 2. 3. 4. 5. \$35,000	\$35,000
Renovations and upgrades. June 2009-September 2009	1. 2. 3. \$5,500 4. \$7,000 5.	\$12,500
Administrative Costs (if needed)		Included above

Year Two, Implementation Estimated Budget

TOTAL \$165,000

Estimated Implementation Budget may not exceed the Budget Calculation from the previous page.

Phase Three, Continued Implementation
Budget Worksheet
Attachment E
Community Roots Montessori

Budget Calculation

$\$100,000 + (\text{Projected Number of Students } 52.5 \times \$1000) = \$152,500$
 Base Allotment + the product of the projected number of students x \$1000 per pupil allotment = Total Phase 2 Allocation
 (may not exceed \$225,000)

Phase funds may be used for:

- a). Professional development of teachers and staff who will work in the charter school
- b). Development and dissemination of materials informing the community of the charter school
- c). Purchase of equipment and educational material
- d). Development of curriculum materials
- e). Other initial operating costs that cannot be met from state or local sources

Budget Categories:

- 1) Salaries
- 2) Benefits
- 3) Purchased Services
- 4) Supplies and Materials
- 5) Capital Equipment

Description and Timeline of Activity	Estimated Expense (Budget Category)	Total Request
Professional development/curriculum. Training, workshops and conferences on charter schools, Montessori education and other relevant topics. June 2010-May 2011	1. 2. 3. \$30,000 4. 5.	\$30,000
Marketing/community outreach. Website maintenance, outreach activities, informational meetings, student enrollment, admissions, including lottery, brochures and other materials (printing and postage). July 2010-June 2011	1. 2. 3. 4. \$10,000 5.	\$10,000

Description and Timeline of Activity	Estimated Expense (Budget Category)	Total Request
Instructional equipment. Materials for third classroom, including computers and audio-visual equipment . June 2009-September 2009	1. 2. 3. 4. \$57,500 5.	\$57,500
Supplies and equipment. Furniture and office equipment. June 2010-September 2010	1. 2. 3. 4. \$40,000 5.	\$40,000
Renovations and upgrades. June 2010-September 2010	1. 2. 3. \$7,000 4. \$8,000 5.	\$15,000
Administrative Costs (if needed)		Included above

Year Three, Continued Implementation Estimated Budget TOTAL \$152,500

Estimated Implementation Budget may not exceed the Budget Calculation from the previous page.

Three-Year Operational Budget
Attachment F

Category	Year 2009 (Implementation)	Year 2010 (Cont'd Implementation)	Year 2011 (No Federal Charter School Grant Funds)
OPERATING REVENUE			
Average number of students	50	65	85
Full time	30	40	55
Part time	20	25	30
Per pupil revenue (from General Purpose Grant per ADMw)	\$4,840.80	\$4,840.80	\$4,840.80
Total received from General Purpose Grant	\$193,632.00	\$254,142.00	\$338,800.00
Federal Charter School Grant	\$165,000.00	\$152,500.00	
Fund raising	\$10,000.00	\$10,000.00	\$10,000.00
REVENUE TOTAL	\$368,632.00	\$416,642.00	\$348,800.00
EXPENSES			
Personnel			
Salary-Administration	\$18,000.00	\$22,000.00	\$46,000.00
Salary-Teaching	\$64,000.00	\$68,000.00	\$72,000.00
Salary-Asst teachers	\$36,000.00	\$40,000.00	\$44,000.00
Salary-Business, Clerical	\$0.00	\$18,000.00	\$20,000.00
Substitute teachers	\$2,000.00	\$3,000.00	\$3,000.00
PERS, benefits & taxes	\$47,333.29	\$56,666.61	\$60,666.61
Personnel Subtotal	\$167,333.29	\$207,666.61	\$245,666.61
Services and Activities			
Staff/ Curriculum Development	\$30,000.00	\$30,000.00	\$17,000.00
Custodial	\$2,500.00	\$3,000.00	\$3,500.00
Transportation/Field Trips	\$0.00	\$0.00	\$0.00
Marketing	\$18,500.00	\$7,500.00	\$10,000.00
Telephone	\$1,000.00	\$1,000.00	\$1,000.00
Postage/Shipping	\$500.00	\$500.00	\$500.00
Printing	\$1,000.00	\$2000.00	\$2000.00
Services and Activities Subtotal	\$53,500.00	\$44,000.00	\$34,000.00

Three-Year Operational Budget
Attachment F, continued

Category	Year 2009	Year 2010	Year 2011
Supplies and Equipment			
Supplies-Instructional	\$55,000.00	\$57,500.00	\$10,000.00
Audio-Visual Equipment	\$5,000.00	\$3,000.00	\$300.00
Assessment/Testing	\$1,000.00	\$1,000.00	\$1,000.00
Computers/Software	\$12,500.00	\$5,000.00	\$500.00
Furniture	\$18,000.00	\$39,000.00	\$1,000.00
Supplies and Equipment Subtotal	\$91,500.00	\$105,500.00	\$12,800.00
Administration Costs			
Copier	\$7,000.00	\$1,000.00	\$1,000.00
Dues/Memberships	\$200.00	\$200.00	\$200.00
Administration Costs Subtotal	\$7,200.00	\$1,200.00	\$1,200.00
Facilities and Capital Outlay			
Rent	\$30,000.00	\$35,000.00	\$42,000.00
Utilities	\$7,000.00	\$8,000.00	\$8,400.00
Maintenance/Repairs	\$0.00	\$0.00	\$4,000.00
Renovations	12,500.00	\$15,000.00	0.00
Facilities and Capital Outlay Subtotal	\$49,500.00	\$58,000.00	\$54,400.00
TOTAL EXPENSES	\$368,033.29	\$416,366.61	\$348,066.61
TOTAL REVENUES	\$368,632.00	\$421,142.00	\$348,800.00