



AN ALAMEDA COUNTY BOARD OF EDUCATION AUTHORIZED CHARTER SCHOOL

## **CHARTER MATERIAL REVISION PACKET**

Submitted by:

**Krishna Feeney, Head of School**

Submitted to:

**Karen Monroe, Superintendent, Alameda County Office of Education; and  
Alameda County Board of Education**

Submitted on:

**June 26, 2020**



June 26, 2020

Sent Via Email  
lkmonroe@acoe.org

Alameda County Office of Education  
Attn: Superintendent L. Karen Monroe  
313 West Winton Avenue  
Hayward, CA 94544

**Re: Material Revision to Urban Montessori Charter School Charter Petition**

Dear Superintendent Monroe:

This letter is to inform you that Urban Montessori Charter School (the "Charter School") hereby submits a material revision to its charter petition to the Alameda County Board of Education and Alameda County Office of Education (hereinafter, collectively the "County"), in accordance with Education Code Section 47607, and applicable County requirements.

The Charter School currently operates at two separate facilities (one Oakland Unified School District ("OUSD" or "District") facility provided under Proposition 39, and the other a privately leased facility). The Charter School intends to relocate to a single District facility under Proposition 39. A detailed description of the proposed facility change is provided in the narrative that follows this cover letter.

In accordance with applicable County requirements, please find enclosed following documents for the material revision submission package:

1. Cover Letter addressed to the County Superintendent of Schools requesting a material revision, and a Narrative that states the reason for the revision and its impact to the school
2. Attachment of supporting documents
3. Evidence that the Charter School's governing board has approved the submission of the material revision request and supporting documentation
4. Revised budget that reflects the fiscal impact of the material revision
5. Revised charter petition that reflects the proposed facility change and includes a reasonably comprehensive description of any new requirement of law since the charter was approved or last renewed pursuant to Education Code Section 47607

Based on correspondence with the County Charter Schools Office staff, it is our understanding that the County Board will hold a public hearing on our material revision request at a Board meeting in July and will take action at a subsequent Board meeting in August. We



# Urban Montessori

CHARTER SCHOOL

respectfully request written confirmation of the official dates of the public hearing and Board action.

By signing below, I confirm that I am submitting this material revision to the Alameda County Board of Education and Alameda County Office of Education and certify that Urban Montessori Charter School will comply with all laws applicable to charter schools in California. We look forward to working with the County during consideration of the material revision to our charter. Please feel free to contact me at [krishnaf@urbanmontessori.org](mailto:krishnaf@urbanmontessori.org) or (510) 690-4838 if you have any questions.

Sincerely,

Krishna Feeney  
Head of School

cc: Juwen Lam, Executive Director – Research, Assessment & Accountability Partnerships



## **MATERIAL REVISION NARRATIVE**

***Proposed material revision to Urban Montessori Charter School to change the school address to:***

***Tilden/John Swett Campus  
4551 Steele St, Oakland, CA 94619***

### **Background Information as to Why the Material Revision is Necessary:**

Urban Montessori Charter School (“UMCS” or the “Charter School”) is currently operating successfully out of our two campuses:

1. OUSD’s Sherman Campus at 5328 Brann Street, Oakland, CA 94619
2. St Jarlath’s Church at 2634 Pleasant Street, Oakland, CA 94602

The Sherman/Brann Street campus was provided by Oakland Unified School District (“OUSD” or the “District”) pursuant to Proposition 39. Due to the limited space at the Brann Street campus, the Charter School has been also separately leasing the St. Jarlath’s Church facilities to ensure all of our students can be served effectively.

UMCS has located at the Brann Street campus since the Charter School first opened its doors, eight years ago. Over that time period, we leased facilities both through Prop. 39 and in-lieu lease agreements with Oakland Unified School District.

Unfortunately, OUSD notified UMCS that we would be unable to remain at our Brann Street Campus for the upcoming 2020-2021 school year when we received our preliminary Prop 39 offer February 1<sup>st</sup>, 2020. In 2020-2021, Melrose Leadership Academy (“MLA”), an OUSD TK-8 school, will be expanding from the Maxwell Park campus and taking over occupancy of the Sherman Campus. While UMCS is excited for the families of Oakland that MLA will be able to grow and serve more students in the community, our Charter School was faced with a sudden and unexpected move from the Brann Street campus for 2020-2021. While both district schools and charter schools, including UMCS, may move campuses, it is unprecedented that a charter school—a public school located in OUSD boundaries—is being required to relocate to accommodate another public school.

OUSD is offering a single-site facility that will accommodate UMCS’ entire student and staff population, allowing us to return to operating from one campus instead of two separate campuses. OUSD has offered the Tilden/John Swett Campus identified above, which will fully house UMCS’s entire student population and staff.

Because this facility change is occurring as a result of OUSD moving another school into UMCS’s



current facilities, UMCS maintains the position that this facility change was not initiated by UMCS and should not be subject to the same material revision requirements that ACOE applies to material revisions for changes in facilities initiated by charter schools. However, UMCS has prepared all of the necessary material revision documentation in accordance with County requirements.

**Impact of the Material Revision on the Charter and Authorizer:**

For the 2020-21 school year, all existing classrooms, administrative and support program support from both the Sherman campus and Jarlath campus will be relocated to the Tilden/John Swett campus. The Charter School will serve students from a single campus, which will provide both convenience and a greater sense of school unity. While the Charter School has been able to effectively operate at two separate facilities, the single campus will provide Charter School administrators and staff to operate even more efficiently and to better serve our students.

UMCS does not expect that the material revision will impact the Alameda County Board of Education and Alameda County Office of Education in any way as to its oversight responsibilities and duties of the Charter School. UMCS affirms continued compliance with all applicable legal requirements and provisions of our charter.

A description of the specific details of the material revision on the charter school operations and on the charter petition is described below.

**Specific Details of the Change Impacting Charter School Operations and/or Charter Petition:**

**Number of Classrooms:** There will be no change in the number of classrooms and/or class sizes. We will maintain the same class sizes of approximately 33 students per each multi-age classroom for a total of 13 classrooms.

**Staff:** There will be no change in staff.

**Grade Levels:** There will be no change in grade levels. We will continue to serve students in grades TK – 8.

**Total Enrollment:** There will be no change in the total enrollment as a result of our address change. Our enrollment projections remain the same as outlined in budget projections.

**Specific Location:** There will be a change in the charter school location. As described above, UMCS will no longer use (1) OUSD's Sherman Campus at 5328 Brann Street, Oakland, CA 94619 and (2) St. Jarlath's Church at 2634 Pleasant Street, Oakland, CA 94602. Instead, in the 2020-21 school year, UMCS will be located at OUSD's Tilden/John Swett Campus at 4551 Steele Street, Oakland, CA 94619.

**Start Date:** We will maintain our fall start date of August 17, 2020.



**Financial Impact:** Moving from two facilities to one will save us approximately \$94,837 overall. These savings come from:

- Decreased utility expenses due to single-site occupancy
- Decreased janitorial expenses due to single-site occupancy
- Assuming Prop 39 rent based on OUSD's proposal
- No longer renting a private facility.

An updated budget, including a table showing the financial impact of the facility change, is attached.

**Revised Charter Elements:**

**Affirmations and Assurances (pp. 6-7):** This section has been updated to reflect a reasonably comprehensive description of any new requirement of law since the charter was approved or last renewed pursuant to Education Code Section 47607.

**Elements A – O:** All charter elements were updated to reflect a reasonably comprehensive description of any new requirement of law since the charter was approved or last renewed pursuant to Education Code Section 47607 (e.g., legal updates pursuant to AB 1505, SB 126, etc.).

**Supplemental Information, Facilities (pp. 158-159):** The “Facilities” section of the charter has been revised to describe the change in Charter School facilities.



# Urban Montessori Charter School

## Minutes

### Special Board Meeting

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**Date and Time**

Thursday June 25, 2020 at 7:30 PM

**Location**

Virtual Only

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PER GOVERNOR NEWSOM'S SHELTER IN PLACE EXECUTIVE ORDER DATED MARCH 19, 2020 ([WHICH IS HERE IN ITS ENTIRETY](#)) AND BY ORDER OF THE HEALTH OFFICER OF THE COUNTY OF ALAMEDA DATED MARCH 16, 2020 ([WHICH IS HERE IN ITS ENTIRETY](#)): THIS WILL BE A VIRTUAL-ONLY MEETING

Join Zoom Meeting: <https://us02web.zoom.us/j/5102904005>

Meeting ID: 510 290 4005

One tap mobile [+16699006833](tel:+16699006833),5102904005# US (San Jose) [+13462487799](tel:+13462487799),5102904005# US (Houston) Dial by your location [+1 669 900 6833](tel:+16699006833) US (San Jose) [+1 346 248 7799](tel:+13462487799) US (Houston) [+1 253 215 8782](tel:+12532158782) US (Tacoma) [+1 312 626 6799](tel:+13126266799) US (Chicago) [+1 929 436 2866](tel:+19294362866) US (New York) [+1 301 715 8592](tel:+13017158592) US (Germantown) Meeting ID: 510 290 4005 Find your local number: <https://us02web.zoom.us/u/kb8IDmVDDD>

Important Notice: Due to increased demand, dial-in by phone audio conferencing capabilities may be unavailable. During this time, Zoom strongly recommends using computer audio capabilities (or via phone with the Zoom app) while on wifi.

If you have any trouble getting on the Zoom, please text 510-290-4005 for support.

Members: Loren Bentley Tammero, Koren Clark, Olivia Couch, Jan Faraguna, Christina Greenberg, Greg Klein, Davis Leung, Nancy McAfee Flemming, Fred Mooradally, Hae-Sin Thomas, Stacey Wang

Urban Montessori Charter School welcomes your participation at Board meetings. The purpose of a public meeting of the Board of Directors ("Board") is to conduct the affairs of the organization in public. Your participation assures us of continuing community interest in our school and assists the Board in making the best decisions for our school. To assist you in the ease of speaking/

participating in our meetings, guidelines are provided at the bottom of this agenda. All materials for all board and committee meetings, including audio recordings of Regular Board Meetings, are available via [http://www.urbanmontessori.org/board\\_of\\_directors](http://www.urbanmontessori.org/board_of_directors).

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**Directors Present**

C. Greenberg (remote), D. Leung (remote), G. Klein (remote), H. Thomas (remote), J. Faraguna (remote), L. Bentley Tammero (remote), N. McAfee Flemming (remote), O. Couch (remote)

**Directors Absent**

F. Mooradally, K. Clark, S. Wang

**Directors Arrived Late**

N. McAfee Flemming

**Directors Left Early**

N. McAfee Flemming

**Guests Present**

D. Bissonnette (remote), K. Feeney (remote)

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**I. Opening Items**

**A. Call the Meeting to Order**

D. Leung called a meeting of the board of directors of Urban Montessori Charter School to order on Thursday Jun 25, 2020 @ 7:32 PM at Virtual Only

**B. Record Attendance**

**C. Review of Action/Discussion Items**

No changes.

**D. Board Member Comment**

No comments.

**E. Presentations from the Floor**

No public comments.

**II. Approval of the Minutes**

**A. Action Item - discuss and vote on the minutes from the June 18, 2020 Regular Meeting**

D. Leung made a motion to approve the minutes from June Board Meeting on 06-18-20.

J. Faraguna seconded the motion.

No public comment on this item. The board **VOTED** to approve the motion.

**Roll Call**

H. Thomas	Aye
D. Leung	Aye
O. Couch	Aye
S. Wang	Absent



G. Klein	Aye
J. Faraguna	Aye
C. Greenberg	Aye
L. Bentley Tammero	Aye
K. Clark	Absent
F. Mooradally	Absent
N. McAfee Flemming	Abstain
N. McAfee Flemming	left early.

### III. Edtec Contract Proposal

#### A. Action Item - discuss and vote on Edtec Contract Proposal 2020-2023

H. Thomas made a motion to to approve the Edtec plus CALPADS contract.

L. Bentley Tammero seconded the motion.

Greg shared the Edtec contract proposal for the upcoming three fiscal years, plus CALPADS support. Less than a traditional COLA increase per year.

Loren asked about two-year vs. three-year contract? Greg clarified the committee's recommendation for the three-year contract. Loren asked about approving a contract beyond our current charter. Krishna shared that the balance of the contract would become invalidated in that scenario.

Jan asked about payments over time, and Krishna explained how Edtec supports with managing receivables to support cash flow, and in the past has been very accommodating in delaying their own payments due to them. Jan asked about payment all in one fiscal year or in each, and Krishna replied that the amounts per year are paid during each separate year.

Greg clarified that the contracted amounts are already included in the adopted budget as included expenses.

Jan asked about the CALPADS add-on. Krishna shared that we are currently paying for those services in a more a la carte fashion and ultimately spending more. Contracting all at once saves money. Hope is to not need that add on for all the years of this contract as work shifts to internal team.

Krishna clarified that finance committee recommended this contract. The board **VOTED** unanimously to approve the motion.

#### Roll Call

G. Klein	Aye
D. Leung	Aye
N. McAfee Flemming	Absent
C. Greenberg	Aye
O. Couch	Aye
K. Clark	Absent
J. Faraguna	Aye
L. Bentley Tammero	Aye
S. Wang	Absent
H. Thomas	Aye
F. Mooradally	Absent
N. McAfee Flemming	arrived late.

### IV. Material Revision of the UMCS Charter

**A. Action Item - discuss and vote on Material Revision to UMCS Charter, along with supporting documentation, for submission to ACOE due to campus address change for 2020-2021, and associated Board resolution documenting this action.**

G. Klein made a motion to approve the material revision, supplemental documents, and the related resolution.

O. Couch seconded the motion.

Krishna explained the reason for the Material Revision to the charter related to address change of the campus. Only other updates are related to updating the charter due to changes in California law since the last approval. All reviewed by UMCS lawyers. Followed all County guidelines on revision process.

Greg shared that OUSD's Board approved the Facilities Use Agreement last night.

Krishna shared that OUSD Staff said they expect to finalize the agreement for the Tilden Campus. The address in the revision is listed as the Tilden campus.

Loren asked about finalizing the agreement, and Krishna clarified that OUSD Staff said that Krishna could communicate publicly about the campus. Expecting access by July 1.

Hae-Sin asked about ACOE guidance for the revision or if they indicated anything beyond the address change being considered by them. Krishna responded that she has clarified guidance multiple times and followed the guidance and supplied all the information requested, including financial implications for the specific material revision due to address change.

Hae-Sin commented that it will be important to connect directly with members of the Board if there are questions.

Greg thanked the team for their work on this. The board **VOTED** to approve the motion.

**Roll Call**

G. Klein	Aye
J. Faraguna	Aye
D. Leung	Aye
O. Couch	Aye
L. Bentley Tammero	Aye
H. Thomas	Aye
C. Greenberg	Aye
N. McAfee Flemming	Aye
K. Clark	Absent
F. Mooradally	Absent
S. Wang	Absent

**V. Closing Items**

**A. Adjourn Meeting**

C. Greenberg made a motion to adjourn.

D. Leung seconded the motion.

The board **VOTED** to approve the motion.

**Roll Call**

H. Thomas	Aye
C. Greenberg	Aye
K. Clark	Absent
S. Wang	Absent
N. McAfee Flemming	Aye
O. Couch	Aye

G. Klein	Aye
J. Faraguna	Aye
D. Leung	Aye
F. Mooradally	Absent
L. Bentley Tammero	Aye

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 7:55 PM.

Respectfully Submitted,  
G. Klein

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### **Documents used during the meeting**

- UMCS-EdTec Proposal-06.16.2020-attachments.pdf

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**THE ORDER OF BUSINESS MAY BE CHANGED WITHOUT NOTICE** Notice is hereby given that the order of consideration of matters on this agenda may be changed without prior notice.

**REASONABLE LIMITATIONS MAY BE PLACED ON PUBLIC TESTIMONY** The Governing Board's presiding officer reserves the right to impose reasonable time limits on public testimony to ensure that the agenda is completed.

**SPECIAL PRESENTATIONS MAY BE MADE** Notice is hereby given that, consistent with the requirements of the Bagley-Keene Open Meeting Act, special presentations not mentioned in the agenda may be made at this meeting. However, any such presentation will be for information only.

**REASONABLE ACCOMMODATION WILL BE PROVIDED FOR ANY INDIVIDUAL WITH A DISABILITY** Pursuant to the Rehabilitation Act of 1973 and the Americans with Disabilities Act of 1990, any individual with a disability who requires reasonable accommodation to attend or participate in this meeting of the Governing Board may request assistance by contacting UMCS at 5328 Brann Street, Oakland, CA 94619 or [info@urbanmontessori.org](mailto:info@urbanmontessori.org).

**FOR MORE INFORMATION** For more information concerning this agenda or for materials relating to this meeting, please contact UMCS at 5328 Brann Street, Oakland, CA 94619 or [board@urbanmontessori.org](mailto:board@urbanmontessori.org). All materials are available via the Governance Section of our website: <http://www.urbanmontessori.org/governance>.



## RESOLUTION OF BOARD OF DIRECTORS OF URBAN MONTESSORI CHARTER SCHOOL

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- (1) WHEREAS Urban Montessori Charter School is required to submit a material revision to its charter due to a required physical address change of the school campus;
- (2) WHEREAS in accordance with Education Code Section 47607, the Urban Montessori Charter School charter petition has been revised to include a reasonably comprehensive description of any new requirement of charter schools enacted into law after the charter was originally granted or last renewed;
- (3) WHEREAS Urban Montessori Charter School has prepared supporting documents for the material revision, including a revised budget;
- (4) WHEREAS the governing boards of both Urban Montessori and Oakland Unified School District have both approved a Facilities Use Agreement for 2020-2021;

NOW, THEREFORE, in consideration of the above statements set forth herein, be it:

(1) RESOLVED, that the Urban Montessori Charter School governing board voted and approved on June 25th, 2020 the submission of the material revision of the Urban Montessori Charter School charter and all supporting documents to the Alameda County Office of Education and the Alameda County Board of Education;

(2) FURTHER RESOLVED, that the Urban Montessori Charter School Head of School is hereby named as the authorized representative to act on behalf of Urban Montessori Charter School with respect to the material revision process, and to take or cause to be taken all such actions as may be required to fulfill the purposes of the foregoing resolution.

### CERTIFICATION

I HEREBY CERTIFY that the foregoing is a true and correct copy of a resolution regularly presented to and adopted by the Board of Directors of Urban Montessori Charter School at a meeting duly called and held at

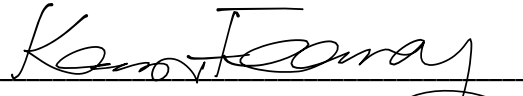
VIRTUAL-ONLY meeting per "Shelter in Place" orders

Meeting <https://us02web.zoom.us/j/5102904005>

Meeting ID: 510 290 4005 Password: [there was no password]

on the 25th day of June, 2020 , at which a quorum was present and voted, and that such resolution is duly recorded in the minute book of this corporation; that the board members referred to in this resolution have been duly elected or appointed to their respective offices.

  
\_\_\_\_\_  
Greg Klein, Board Secretary

  
\_\_\_\_\_  
Krishna Feeney, Head of School

**FACILITIES USE AGREEMENT BETWEEN  
OAKLAND UNIFIED SCHOOL DISTRICT AND  
URBAN MONTESSORI  
FOR USE OF CLASSROOM SPACE FOR EDUCATIONAL PURPOSES at  
4551 STEELE STREET, OAKLAND, CA 94619 OR  
915 54<sup>TH</sup> STREET, OAKLAND, CA 94608**

THIS FACILITIES USE AGREEMENT (“Agreement”) is effective this \_\_\_ day of \_\_\_, 2020 by and between the OAKLAND UNIFIED SCHOOL DISTRICT, a California public school district (“District”) and **Urban Montessori**, a California non-profit public benefit corporation (“Charter School”) for use of classroom space for educational purposes for grade(s) **TK to 8**. District and Charter School may be referred to herein individually as a “Party” or collectively as the “Parties.”

**RECITALS**

**WHEREAS**, Charter School is a non-profit public benefit corporation that is operating a charter approved by the Alameda County Office of Education under the laws of the Charter Schools Act of 1992 (Education Code §47600 *et seq.*); and

**WHEREAS**, the District and Charter School enter into this Agreement wherein the District and Charter School mutually agree that the Charter School will occupy classrooms and use facilities (the “Premises”), as particularly described in Exhibit A and located at 4551 Steele St, Oakland, CA 94619, or 915 54th Street, Oakland, CA 94608, as set forth in the April 8, 2020 Final Offer (“Final Offer”) during the 2020-2021 school year. The location of the Premises used and occupied by the Charter School for the 2020-2021 school year under the Final Offer shall be referred to as the “School Site.”

**NOW THEREFORE**, in consideration of the covenants and agreements hereinafter set forth, the Parties agree as follows:

**AGREEMENT**

- 1. Use of Premises.** District agrees to allow use of the Premises at the School Site(s) by Charter School for the sole purpose of operating Charter School’s educational program for grade(s) TK to 8 in accordance with all applicable federal, state and local regulations relating to the Premises and to the operation of Charter School’s educational program, and all associated uses therewith. Charter School shall not use the Premises for any use other than that specified in this Agreement without the prior written consent of District.
  - 1.1.** Charter School shall not commit, or suffer to be committed, any waste upon the Premises, or allow any sale by auction upon the Premises, or allow the Premises to be used for any unlawful purpose, or place any loads upon the floor, walls or ceiling which endanger the structure, or place any harmful liquids in the plumbing, sewer or storm water drainage system of the Premises. No waste materials or refuse shall be dumped upon or permitted to remain upon any part of the Premises except in trash containers designated for that purpose.

- 1.2. Any uses which involve the serving and/or sale of alcoholic beverages and the conducting of games of chance are prohibited on the Premises. Charter School shall comply with the District-wide policy prohibiting the use of tobacco products on the Premises at all times.
- 1.3. Charter School shall not use or permit the use of the Premises or any part thereof for any purpose not consistent with a public educational facility.
- 1.4. Charter School shall require all of Charter School's invitees and guests to use the Premises only in conformance with the permitted use and with applicable governmental laws, regulations, rules and ordinances. The charter school shall comply with school district policies regarding the operations and maintenance (as applicable) of the school facility and furnishings and equipment, except to the extent variation is approved by the district. However, the charter school need not comply with policies in cases where actual school district practice substantially differs from official policies. Charter School shall comply with District policies and practices regarding Campus Security and Disruptions available to the Charter School. Where the Premises are damaged by the Charter School's invitees and/or guests, and the Charter School's negligence in supervising its invitees and/or guests was a contributing factor, the Charter School's insurance shall be primary for this damage.
- 1.5. Charter School shall not do or permit anything to be done in or about the Premises nor bring or keep anything therein which will in any way increase the District's existing insurance rate or affect any fire or other insurance upon the Premises, or cause a cancellation of any insurance policy covering the Premises or any part thereof or any of the contents of the Premises, nor shall the Charter School sell or permit to be kept, used or sold in or about the Premises any articles which may be prohibited by a standard form policy of fire insurance.
- 1.6. **Civic Center Act.** Charter School agrees to comply with the provisions of the Civic Center Act (Education Code § 38131 *et seq.*) to make the Premises accessible to members of the community. The Parties understand that the Premises are to be used primarily for educational programs and activities and, as such, any use of the Premises by the Community shall not interfere with Charter School's educational program or activities. Any request received by Charter School for use of the Premises pursuant to the Civic Center Act shall be promptly forwarded to the District. District shall be responsible for coordinating access to the Premises under the Civic Center Act, and any fee paid for use of the Premises under the Civic Center Act shall be paid to the District, unless the Charter School under this Agreement bears the responsibility of paying for day-to-day or routine maintenance, in which case the fee shall be paid to the Charter School.

## 2. Term.

- 2.1. The term of this Agreement shall be for **one year**. The commencement date shall be that date when the District makes Premises available for occupancy by the Charter School, ("Commencement Date") expected to be July 1, 2020, and, unless sooner terminated under any provision hereof, this Agreement shall end on June 30, 2021 ("Term"). However, the Parties agree that Charter School shall take possession of the Premises on a date to be mutually agreed upon between the Parties. In the event the Premises are

not available for Charter School to take possession by June 30, 2020 (when Charter School's current facilities agreement with District expires), the District shall prior to that date either provide Charter School secure storage space at the School Site, or pay for commercial storage space until the Premises are available for Charter School's occupancy, at the District's option. The Premises will be made available to the Charter School not later than August 1, 2020.

### **3. Use Fee**

3.1. For and in consideration of the use of the Premises for the Term of this Agreement, Charter School agrees to pay District an annual use fee which is based on the 2020-21 Proposition 39 per square foot rate as applied to the Premises multiplied by the School Site square footage used and occupied by the Charter School ("Use Fee"). The parties agree that when the Charter School's Premises are identified, they will memorialize the total pro-rata in writing, to be affixed as an Addendum to this Agreement.

3.2. The Use Fee shall be paid quarterly during the school year, according to the following schedule: 25% by October 1, 2020; 25% by December 1, 2020, 25% by March 1, 2021; 25% by July 15, 2021.

#### **3.3. Utilities**

District shall furnish or cause to be furnished to the Premises necessary utilities. For purposes of the Agreement, utilities include electrical, natural gas, sewer, waste disposal/recycling and water services. The District's failure to furnish or cause to be furnished utilities when the failure is caused by (i) acts beyond the reasonable control of the District; (ii) strikes, lockouts, labor disturbances or labor disputes of any kind; (iii) any laws, rules, orders, ordinances, regulations, requirements or any other action by federal, state, county or municipal authority; or (iv) any other unavoidable delay, shall not cause the District to be in default of the Agreement and shall not result in any liability of the District. Charter School shall comply with all District energy conservation policies relating to use of the Premises. To the extent the utilities to the Premises are separately metered, Charter School agrees to pay the costs of these utilities directly to the utility providers. If not separately metered, the District shall bill Charter School for its proportionate share of utilities used at the Premises on a quarterly basis as set forth in Section 3.3 above, and the District shall provide documentation of how it calculated Charter School's proportionate share.

3.4. Charter School acknowledges that late payment by Charter School to District of the Use Fee and other sums due hereunder will cause District to incur costs not contemplated by this Agreement, the exact amount of which will be extremely difficult to ascertain. Such costs include, but are not limited to, processing and accounting charges. Accordingly, if District does not receive any installment of the Use Fee or any other sum due from Charter School by 4:00 p.m. within ten (10) days after such amount is due, Charter School shall pay to District, as an additional Use Fee, a late charge equal to five percent (5%) of such overdue amount or the maximum amount allowed by law, whichever is less. The Parties hereby agree that such late charges represent a fair and reasonable estimate of the costs District will incur by reason of late payment by Charter School. Acceptance of any late

charge by District shall in no event constitute a waiver of Charter School's default with respect to the overdue amount, nor prevent District from exercising any of its other rights and remedies granted hereunder.

- 4. Internet.** The Charter School shall obtain its own internet service and telephone provider and shall assume sole responsibility for obtaining all hardware at its own expense, as well as upkeep and maintenance of all telephone systems, data lines, and related equipment, software and hardware. Charter School may use any pre-existing T-1 Line located in the Dedicated Space, if any. In the event Charter School uses a pre-existing T-1 Line, Charter School shall transfer billing of the line to Charter School upon approval from the District's Technology Services Department.
- 5. Furnishings and Equipment.** The District shall provide, in accordance with the Proposition 39 regulations, furnishings and equipment at the Premises for 351.32 in-District ADA. These furnishings and equipment shall remain the property of the District. The furnishings and equipment provided shall be equivalent to those furnishings and equipment provided in the comparison group of schools in accordance with California Code of Regulations, Title 5, section 11969.3, but shall not include hardware used to operate the Charter School's internet and telephone service. The District and the Charter School shall develop a mutually agreeable inventory of furnishings and equipment that will be located at the Premises. District shall only be obligated to replace furnishings and equipment supplied by the District in accordance with District established schedules and practices.
- 6. Additional Services.** Charter School and District may negotiate additional services or equipment as requested by Charter School. District shall assess Charter School separately for the cost to provide the additional services or equipment, if any.
- 7. Shared School Site and Recreational Facilities.** Charter School acknowledges and understands that the Premises are located in an operating public school site. As such, the School Site and the playgrounds, common areas, recreational facilities and other outdoor play areas (collectively "Shared Space") may be used by other parties, including the District. The District and Charter School shall have priority for use of the School Site over other parties, and shall meet and confer with respect to joint use agreements that are in effect between the District and a third party at the time of execution of this Agreement. Charter School shall cooperate with the other parties and the District in reaching amicable arrangements concerning the use, maintenance and security of the Shared Space, but in no event shall such other uses at the School Site interfere with Charter School's exclusive use of the Premises nor its proportionate access to and use of the Shared Space. To facilitate cooperative working relationships on shared campuses, the District encourages charter schools and District schools on a shared campus to negotiate terms of their arrangements in advance of the beginning of the school year.
- 8. Parking.** The Parties shall abide by District and School Site policies concerning the use of parking, including the District policy relating to the drop-off and pick-up of students. Charter School may instruct its visitors, invitees and guests to park on available street parking. Charter School shall not abandon any inoperative vehicles or equipment on any portion of the School Site. District shall not be liable for any personal injury suffered by Charter School or Charter School's visitors, invitees and guests arising out of the use of parking at or near the Site, unless caused by District's negligence or misconduct. District shall not be responsible for any damage to or destruction or loss of any of Charter School or Charter School's visitors, invitees, or guests' personal property



located or stored in street parking, or the School Site, except where such damage is caused by the District's negligence or misconduct. Charter School accepts parking "as is" and Charter School acknowledges that District has not made and is not making any warranties whatsoever with respect to the parking.

**9. Full Satisfaction of Proposition 39/Release of Claims.** Parties agree that this is a negotiated agreement and both Parties agree to waive their right to bring a legal action for the term of this Agreement based on compliance or noncompliance with Education Code section 47614 and the Proposition 39 regulations for the 2020-21 Prop. 39 cycle. This waiver does not extend to the obligations set forth in this Agreement.

**10. Condition of Premises.**

10.1. District shall not be required to make or construct any alterations including structural changes, additions or improvements to the Premises. District shall, however deliver the Premises to the Charter School in compliance with the requirements of the Americans with Disabilities Act, California Fair Employment and Housing Act, and other applicable building code standards. Charter School, and not the District shall be responsible for compliance with the Americans with Disabilities Act, California Fair Employment and Housing Act, and other applicable building code standards in connection with any modification to the Premises by Charter School after Charter School takes possession of the Premises. By entry and taking possession of the Premises pursuant to this Agreement, Charter School accepts the Premises.

10.3. The Parties agree that if the Premises become damaged to a lesser condition than currently exists, and if the damage is due to no negligence or fault of Charter School, then District will repair the damage in order to bring it back to a condition which is similar to the condition which existed at the time Charter School took possession of the Premises. District may, however, terminate this Agreement if the cost to repair the Premises exceeds Two Hundred Fifty Thousand dollars (\$250,000) per incident. District shall pro-rate the Use Fee during the "repair" period, if the resulting structural damage prohibits Charter School from carrying out its normal daily activities. If District elects not to perform a repair estimated to cost in excess of Two Hundred Fifty Thousand dollars (\$250,000), Charter School may elect to remain in possession of the Premises and pay the Pro Rata Share, unless revised through mutual agreement of the Parties, or Charter School may elect to terminate this Agreement. If either District or Charter School terminates this Agreement for just cause as set forth herein, the District shall immediately use its best efforts to immediately provide the Charter School with reasonably equivalent alternative facilities to accommodate its projected in-District ADA for the remaining term of this Agreement.

**11. Title to School Site(s) / Classroom Buildings.** The Parties acknowledge that title to the School Site and Premises is held by District.

**12. District's Entry and Access to Premises.** District and its authorized representatives shall have the right, after two school-days' prior written notice to Charter School, to enter the Premises during normal business hours for the purpose of inspection ("Inspection"). Provided, however, that in an emergency situation, no prior notice shall be required. In an emergency, District shall give notice to Charter School immediately upon District's receipt of notification of any emergency. If Charter

School is not present to open and permit an entry into the Premises in an emergency situation as reasonably determined by District, District may enter by means of a master key without liability to Charter School.

- 12.1. If Charter School is violating the use restrictions of the Agreement or is not in material compliance with any applicable law, then all reasonable costs and expenses reasonably and actually incurred by District in connection with any Inspection shall become due and payable by Charter School as additional sums due District, within ten (10) days of presentation by District of an invoice for the Inspection.
- 12.2. If Charter School fails to perform any covenant or condition to be performed by Charter School pursuant to the Agreement, District and its authorized representative shall have the right, after reasonable prior written notice to Charter School, to enter the Premises during normal business hours for the purpose of performing the covenant or condition at District's option after thirty (30) days' written notice to and failure to perform by Charter School (provided, no written notice is required in the case of emergencies). . Any performance by District of Charter School's obligations shall not waive or cure the default. All reasonable out-of-pocket costs and expenses actually incurred by District, including reasonable attorneys' fees (whether or not legal proceedings are instituted), in collecting the fees herein or enforcing the obligations of Charter School under the Agreement shall be paid by Charter School to District within ten (10) days of written demand.
- 12.3. District may, during the progress of such work, keep and store on the Premises all necessary materials, tools, supplies and equipment, but shall do so in a manner designed to limit the inconvenience, annoyance, disturbance, loss of business, or other damage to Charter School. District shall not be liable for inconvenience, annoyance, disturbance, loss of business or other damage to Charter School by reason of making the repairs or the performance of any work.
- 12.4. Notwithstanding the foregoing and without further notice, District shall have the right to enter the Premises to conduct its own operations, to perform any routine or deferred maintenance, custodial services, or conduct inspections of the Premises. District will use reasonable efforts during the course of any access of the Premises to not disrupt Charter School's classroom and instructional activities consistent with District's practices at its schools. Where practicable, District shall provide relevant scheduling information to Charter School.
- 12.5. Charter School expressly waives any claim for damages for any inconvenience to or interference with the Charter School's educational program, any loss or use of quiet enjoyment of the Premises related to District's entry into the Premises for the purposes identified in this Section.

### **13. Surrender of Premises.**

- 13.1. On the last day of the Term, or on sooner termination of this Agreement, Charter School shall surrender in good order, condition, and repair the Premises to District and any existing improvements made by Charter School that were approved by the District, and any structural improvements made by District subsequent to the Commencement Date,

excepting normal ordinary wear and tear, and free and clear of all liens, claims and encumbrances, though nothing in this provision shall be construed to authorize Charter School to allow or cause to be placed any liens, claims and/or encumbrances of any kind, unless expressly permitted in this Agreement. This Agreement shall operate as a conveyance and assignment to District of any improvements identified by District to remain on the Premises.

- 13.2. Charter School shall remove from the Premises all of Charter School's personal property, trade fixtures, and any improvements made by Charter School which Charter School and District agreed would be removed by Charter School. Removal of Charter School's property shall be subject to all applicable laws, including any local permits and/or approval by the California Department of General Services, Division of the State Architect.
  - 13.3. All property that is not removed on or before the end of the Term shall be deemed abandoned by Charter School and associated costs to store, remove or dispose of abandoned property shall be the responsibility of the Charter School. If the Premises are not surrendered at the end of the Term or upon earlier termination of this Agreement, Charter School shall indemnify District against loss or liability resulting from delay by Charter School in surrendering the Premises including, without limitation, any claims made by any succeeding Charter School or loss to District due to lost opportunities to timely obtain succeeding tenants.
  - 13.4. **Holding Over.** If Charter School remains in possession of the Premises or any part thereof after the end of the Term or upon earlier termination of this Agreement without the express written consent of District, Charter School's occupancy shall be a tenancy on a month-to-month basis for a pro rata share equal to one hundred fifty percent (150%) of all monthly sums charged and owing the previous thirty (30) calendar day period.
  - 13.5. No payment of money by Charter School after the termination of the Agreement, or after the giving of notice of termination by the District to the Charter School, shall reinstate, continue or extend the Term.
  - 13.6. **Overallocation of Space.** The Charter School's projected in-District Average Daily Attendance ("ADA") for the 2020-21 school year, upon which the Premises are provided, is 351.32. The Charter School's actual ADA during the term of this Agreement shall not exceed its projected ADA by 10%. The parties agree that the overallocation provisions under the California Code of Regulations, Title 5, section 11969.8 only shall apply to this Agreement. Notwithstanding the forgoing, the District shall not seek overallocation reimbursement in the event that Charter School's in-District ADA is impacted by social distancing requirements or other health and safety orders applicable to Charter School's use of the Premises.
- 14. Taxes and Assessments.** Charter School shall pay any assessment on the Premises, including any improvements which Charter School constructs or causes to be constructed on the Premises, whether real estate, general, special, ordinary or extraordinary, or rental levy or tax, improvement bond, and/or fee imposed upon or levied against the Premises or Charter School's legal or equitable interest created by this Agreement, and the taxes assessed against and levied upon Charter School's alterations and utility installations that may be imposed by any authority having

the direct or indirect power to tax and where the funds are generated with reference to the Premises' address and where the proceeds so generated are applied by the city, county or other local taxing authority having jurisdiction. The provisions of this Section shall survive the expiration or earlier termination of this Agreement. Nothing in this Section shall be construed to override the requirement in the Section "Title to and Removal of Charter School's Improvements/Premises; Equipment Requirements" of this Agreement that Charter School obtain the express written consent of the District to perform any improvements on the site, unless expressly permitted by this Agreement.

## **15. Maintenance.**

### **15.1. Routine Repair, Cleaning and General Maintenance.**

15.1.1. **Co-located School Sites.** In cases of co-location between the District and Charter School, District shall be responsible for the routine repair, cleaning and general maintenance of the Premises and any furnishing or equipment provided to Charter School. For purposes of the Agreement, "routine repair, cleaning and general maintenance" shall mean the school facility component work performed on an annual basis each year to keep facilities in proper operating condition. District shall also be responsible for ongoing operations and maintenance of the facilities on the Premises as defined in California Code of Regulations, Title 5, section 11969.4(b). The District shall only be obligated to perform routine repair, cleaning and general maintenance on the Premises on an equivalent basis as that performed at other comparable District school sites and provided that the Premises and School Site are maintained in a suitable manner for Charter School's use pursuant to this Agreement. Charter School will be responsible for its fair share of routine repair, cleaning, custodial costs of District provided custodian (if applicable), and general maintenance costs.

15.1.2. **Exclusive-Use Sites.** In cases in which the Charter School has exclusive of its site (defined as not sharing a site with a District school), Charter School agrees to provide, at its own cost and expense, any and all day to day maintenance and operations for the Premises. Maintenance to be provided by Charter School shall be consistent with the standards set forth in Section 1.4 of this Agreement and shall insure safe and healthful use.

In cases in which the Charter School has exclusive use of its site, District shall have no day to day maintenance or repair obligations with respect to the Premises. Charter School hereby expressly waives the provisions of Subsection 1 of section 1932 and sections 1941 and 1942 of the Civil Code of California and all rights to make repairs at the expense of District as provided in section 1942 of the Civil Code.

15.2. **Deferred Maintenance.** District shall be responsible for the major maintenance of the Premises. For purposes of the Agreement, "major maintenance" includes, for example, the major repair or replacement of plumbing, heating, ventilation, air conditioning, electrical, roofing, and floor systems, exterior and interior painting, and any other items considered deferred maintenance under Education Code section 17582. The District shall only be obligated to perform deferred maintenance on the Premises on an equivalent basis as that performed at other comparable District school sites and provided that the

Premises and School Site are maintained in a suitable manner for Charter School's use pursuant to this Agreement.

**16. Title to and Removal of Charter School's Improvements / Premises; Equipment Requirements.**

- 16.1. Charter School shall not construct or cause to be constructed on the Premises any improvements ("Charter School's Improvements") without express prior written consent from the District. For District consent and approval, Charter School's Improvements must be considered necessary to the operation of Charter School's educational program. The District shall have sole discretion to determine whether or not to provide approval. At the time the District considers the Charter School's request to construct improvements on the Premises, the District will inform the Charter School, in writing, whether it will require the Charter School to remove the Charter School Improvements at the expiration or earlier termination of the Term.
- 16.2. Charter School shall at its expense obtain all necessary environmental and governmental approvals and permits, including, without limitation, the California Environmental Quality Act (Public Resources Code section 21000 et seq.) ("CEQA"), the Field Act (Education Code section 17280 et seq.), any other applicable Building Code requirements, the Americans with Disabilities Act of 1990, (42 U.S.C. § 12101 and applicable State law governing access to facilities, as well as any necessary approvals from any local authority including any Site(s), grading, zoning, design review and other required permits or approvals, if applicable, prior to commencing construction and shall provide District with evidence of approval by all applicable governmental agencies. To the extent that the District assumes lead agency status for any "project" under CEQA related to the provision of facilities under this Agreement, Charter School agrees to reimburse the District for any and all reasonable costs and expenses related to achieving compliance with CEQA.
- 16.3. Any modifications to the Premises must be approved in writing in advance by District. Charter School's contractor must be approved in advance by District, which approval shall not be unreasonably withheld. All contractors and subcontractors of Charter School, if any, shall be duly licensed in the State of California, bonded as required by law and must maintain levels of casualty, liability and workers' compensation insurance and performance and payment bonds consistent with District construction requirements. Charter School must follow all applicable procurement laws with respect to the Eligible Improvements; issue requests for proposals for all projects to obtain competitive pricing; adhere to prevailing wage laws; shall make best efforts to comply with the local hiring requirements in accordance with District Administrative Regulation and Board Policy 7115 ("Capital Program / Construction Related Local, Small Local and Small Local Resident Business Enterprise Program, and Board Policy"); and adhere to all applicable minimum wage requirements. Charter School is encouraged to incorporate Collaborative for High-Performance Schools standards into the design of all improvements made under this Agreement and is encouraged to incorporate all editions of the California Green Building Standards Code.
- 16.4. Charter School must seek and receive approval from the Division of the State Architect for any of Charter School's Improvements, if required by DSA.

- 16.5. Charter School shall not install any ovens, stoves, hot plates, toasters, or similar items (not including microwave ovens) without the prior written consent of the District.
- 16.6. Charter School shall at all times indemnify and hold District harmless from all claims for labor or materials in connection with construction, repair, alteration, or installation of structures or improvements by, at the direction of, the Charter School within the Premises, and from the cost of defending against such claims, including attorney's fees. Charter School shall provide District with at least ten (10) days written notice prior to commencement of any work which could give rise to a mechanics' lien or stop payment notice. District has the right to enter upon the Premises for the purpose of posting Notices of Non-responsibility. In the event a lien is imposed upon the Premises as a result of such construction, repair, alteration, or installation, Charter School shall either:
- 16.6.1. Record a valid Release of Lien; or
  - 16.6.2. Deposit sufficient cash with the District to cover the amount of the claim on the lien in question and authorize payment to the extent of the deposit to any subsequent judgment holder that may arise as a matter of public record from litigation with regard to the lien-holder claim; or
  - 16.6.3. Procure and record necessary bonds that frees the Premises from the claim of the lien from any action brought to foreclose the lien.

If Charter School fails to accomplish one of these three optional actions within fifteen (15) days after the filing of any lien or stop payment notice, the Agreement shall be in default and shall be subject to immediate termination.

- 16.7. If required by the District at the time it approved the Charter School's Improvements, on or before the expiration of this Agreement, or within thirty (30) days after any earlier termination of this Agreement, Charter School shall remove Charter School's Improvements, at its sole expense. Charter School shall repair any damage to the School Site and/or the Premises caused by removal of Charter School's Improvements and restore the School Site and the Premises to good condition, less ordinary wear and tear. In the event that Charter School fails to timely remove Charter School's Improvements, District, upon fifteen (15) days written notice, may either (1) accept ownership of Charter School's Improvements with no cost to District, or (2) remove Charter School's Improvements at Charter School's sole expense. If the District chooses to accept ownership of Charter School's Improvements, Charter School shall execute any necessary documents to effectuate the change in ownership of Charter School's Improvements. If the District removes Charter School's Improvements, Charter School shall pay all invoices for the removal of Charter School's Improvements within thirty (30) days of receipt of an invoice.
- 17. Safety of Premises.** The School Site, including the Premises, may be monitored by a safety system or protocol implemented, maintained and operated by District ("District's Safety Measures"). However, Charter School specifically acknowledges, understands, and agrees that District is neither responsible for nor has the obligation to supply, provide, establish, maintain, or operate District's Safety Measures for either Charter School or the Premises, except that the District's

police service will be responsible for monitoring and surveying the Premises consistent with its practice for other District school sites, will respond to calls for police presence from the Charter School, and will notify the Charter School, consistent with its policies and protocols for all District schools, if the Premises are broken into, defaced, or damaged or District police are otherwise notified about information related to the Premises. Charter School shall develop a School Safety Plan under Education Code section 47605(b)(5)(F)(ii).

**18. Fingerprinting and Criminal Background Verification.** Charter School shall be responsible for ensuring compliance with all applicable fingerprinting and criminal background investigation requirements described in California Education Code section 45125.1.

**19. Default.**

**19.1. Charter School's Default.** The occurrence of any one of the following events shall be considered a default of the Agreement by Charter School:

19.1.1. The failure of Charter School to promptly pay the Use Fee or other fees or indebtedness identified herein when due hereunder, which failure continues for fifteen (15) days after written notice thereof by District to Charter School; provided, however, that any notice shall be in lieu of, and not in addition to, any notice required under Code of Civil Procedure section 1161, and the three (3) day cure period shall run concurrently with any cure period required under California law, including Code of Civil Procedure section 1161;

19.1.2. The revocation or non-renewal of the Charter School's charter, upon exhaustion of any appeals as provided under Education Code sections 47605 or 47607;

19.1.3. The failure of Charter School to observe or perform any of its other covenants or obligations hereunder, which failure continues for thirty (30) days after written notice thereof by District to Charter School (unless the nature of the default is such that more than thirty (30) days are required for its cure and Charter School shall have commenced a cure within the thirty (30) day period and thereafter diligently prosecute the same to completion; provided, however, in no event shall the default continue for more than ninety (90) days after written notice thereof by District to Charter School); provided, however, that any notice shall be in lieu of, and not in addition to, any notice required under Code of Civil Procedure section 1161, and the thirty (30) day cure period shall run concurrently with any cure period required under California law, including Code of Civil Procedure section 1161;

19.1.4. Charter School's abandonment of the Premises for a period of fifteen (15) consecutive days (with or without the payment of fees), it being agreed that the fact that any of Charter School's property remains in the Premises shall not be evidence that Charter School has not vacated or abandoned the Premises; provided, however, any normal holidays or vacation days shall not constitute abandonment of the Premises;

- 19.1.5. The making by Charter School of any general assignment or general arrangement for the benefit of creditors; the filing by or against Charter School or any guarantor of the Agreement of a petition to have Charter School or any guarantor of the Agreement adjudged a bankrupt or a petition for reorganization or arrangement under any law relating to bankruptcy (unless, in the case of a petition filed against Charter School or any guarantor of the Agreement, the same is dismissed within sixty (60) days); the appointment of a trustee or receiver to take possession of substantially all of the Charter School's assets located at the Premises, or of Charter School's interest in the Agreement, where possession is not restored to Charter School within thirty (30) days; or the attachment, execution or other judicial seizure of substantially all of Charter School's assets located at the Premises or of Charter School's interest in the Agreement, where such seizure is not discharged within thirty (30) days;
- 19.1.6. The making or furnishing by Charter School of any warranty, representation or statement to District in connection with the Agreement, which is false or misleading in any material respect when made or furnished; or
- 19.1.7. The assignment, subletting or other transfer, or any attempted assignment, subletting or other transfer, of the Agreement.

In the event of any default by Charter School, District shall have the right, in addition to all other rights available to District under the Agreement or now or later permitted by law or equity, to terminate the Agreement by providing Charter School with a notice of termination. Upon termination of the Agreement, District may recover from Charter School the worth at the time of award of the unpaid Rent and any other accrued fees which are due at the time of termination. In addition, upon termination, Charter School shall immediately vacate the Premises.

The rights and remedies of District set forth herein are not exclusive, and District may exercise any other right or remedy now or later available to it under the Agreement, at law or in equity.

- 19.2. **District's Default.** District shall not be in default of any of its obligations hereunder, unless District fails to perform such obligations within a reasonable time, but in no event less than thirty (30) days, after written notice by Charter School to District specifying that District has failed to perform its obligations; provided, however, that if the nature of District's default requires more than thirty (30) days to cure, District shall not be in default if District commences a cure within thirty (30) days and thereafter diligently prosecutes the same to completion. If the District defaults hereunder, then Charter School may have by reason of such default all remedies available at law or equity, which includes the remedy of self-help and deduction of reasonable self-repair costs from the pro rata share payments owed.
- 19.2.1. Charter School shall have no rights as a result of any default by District until Charter School gives thirty (30) days' notice to District specifying the nature of the default. If the District defaults hereunder after receipt of the Charter School's written notice, then Charter School may have by reason of such default remedies



including the remedy of self-help and deduction of reasonable self-repair costs from the pro rata share payments owed.

**20. Reciprocal Indemnification.**

District and Charter School hereby agree and acknowledge that the relationship between District and Charter School for purposes of this Agreement is solely a landlord/tenant relationship and not a principal/agent relationship or any other relationship. Charter School is acting on its own behalf in operating from the Premises any school thereon (or any other purpose(s) thereupon) and is not operating as an agent of District. Except where the losses, costs, damages, expenses, and liabilities (including without limitation court costs and reasonable attorneys' fees ) are caused by District's negligence or misconduct, to the fullest extent permitted by law, Charter School ("Indemnifying Party") shall indemnify, defend, release and protect District, its affiliates, successors and assigns, and its officers, directors, shareholders, board members, other members, partners, agents and employees ("Indemnified Party" or "Indemnified Parties") and hold the Indemnified Parties harmless from any and all losses, costs, damages, expenses and liabilities (including without limitation court costs and reasonable attorneys' fees) (collectively "Claims") incurred in connection with or arising from any cause (i) in the use or occupancy by Charter School of the Premises and/or the School Site (including without limitation, the operation by Charter School of the School from the Premises and/or the School Site), or (ii) in connection with the operations by Charter School at the Premises and/or the School Site, including without limiting the generality of the foregoing:

(a) Any default by Charter School in the observance or performance of any of the terms, covenants or conditions of the Agreement on Charter School's part to be observed or performed;

(b) The use or occupancy of the Premises and/or the School Site by Charter School of any person claiming by, through or under Charter School or Charter School's employees, agents, contractors, licensees, directors, officers, partners, trustees, visitors or invites, or any such person in, on or about the Premises and/or the School Site either prior to, during, or after the expiration of the Term of the Agreement (singularly, "Liability"; collectively, "Liabilities"); and

(c) Any claim by a third party that District is responsible for any actions by Charter School in connection with any use or occupancy of the Premises and/or the School Site or in any way related to this Agreement.

Except where the losses, costs, damages, expenses and liabilities (including without limitation court costs and reasonable attorneys' fees) are caused by Charter School's negligence or misconduct, to the fullest extent permitted by law, District shall ("Indemnifying Party") shall indemnify, defend, release and protect Charter School, its affiliates, successors and assigns, and its officers, directors, shareholders, board members, other members, partners, agents and employees ("Indemnified Party" or "Indemnified Parties") and hold the Indemnified Parties harmless from any and all losses, costs, damages, expenses and liabilities (including without limitation court costs and reasonable attorneys' fees) (collectively "Claims") incurred in connection with or arising from any cause (i) in the use or occupancy by District of the Premises and/or the School Site (including without limitation, the operation by District of operations on the Premises and/or the School Site), or (ii) in connection with the operations by District at the Premises and/or the School Site, including without limiting the generality of the foregoing:

(a) Any default by District in the observance or performance of any of the terms, covenants or conditions of the Agreement on District's part to be observed or performed;

(b) The use or occupancy of the Premises and/or the School Site by District or any person claiming by, through or under District or District's employees, agents, contractors, licensees, directors, officers, partners, trustees, visitors or invitees, or any such person in, on or about the Premises and/or the School Site either prior to, during, or after the expiration of the Term of the Agreement (singularly, "Liability"; collectively, "Liabilities"); and

(c) Any claim by a third party that Charter School is responsible for any actions by District in connection with any use or occupancy of the Premises and/or the School Site or in any way related to this Agreement.

The provisions of this Section 20 shall survive the expiration or sooner termination of this Agreement. An Indemnifying Party shall, upon request by an Indemnified Parties, undertake the defense of any Liabilities threatened or asserted against such Indemnified Party on the following terms and conditions:

(a) Notice of the assumption of such defense ("Notice") shall be delivered to such Indemnified Party within fifteen (15) days after transmittal.

(b) By the Indemnified Party of a request that Indemnifying Party defend such Liability. Such defense shall be conducted by reputable attorneys retained by Indemnifying Party and approved by the other Party, and with the prior written approval of all the Indemnified Parties against whom such Liability has been asserted or threatened, which approval shall not be unreasonably withheld, delayed or conditioned, all at Indemnifying Party's sole cost and expense. In the event the interests of Indemnifying Party and any such Indemnified Parties in the action conflict in such manner and to such an extent as to require, consistent with applicable standards of professional responsibility, the retention of separate counsel for any of the Indemnified Parties involved in the action, Indemnifying Party shall pay all fees and costs charged or incurred by separate counsel chosen by such Indemnified Parties.

(c) Indemnifying Party agrees to promptly notify the other Party of the commencement of any litigation or proceedings pending, threatened or commenced (whether or not served) against Indemnifying Party, or any of the directors, officers, agents or employees of Indemnifying Party, in connection with the matters set forth in this Agreement. The provisions of this Section shall survive the expiration or sooner termination of this Use Agreement.

## **21. Insurance.**

21.1. Insurance is to be placed with insurers with a current A.M. Best Insurance rating of no less than A-minus: VII and subject to the approval of District, except that insurance through a Joint Powers Authority shall be deemed sufficient under this Agreement. Charter School shall furnish District with the original certificates and amendatory endorsements, or equivalent documentation, effecting coverage required.

21.2. Charter School acknowledges that the insurance to be maintained by District on the School Site will not insure any of Charter School's property or improvements made by Charter School.

21.3. Charter School shall, at Charter School's expense, obtain and keep in force during the term of this Agreement a policy of commercial general liability insurance and a comprehensive auto liability policy insuring District and Charter School against claims and liabilities arising out of the operation, condition, use, or occupancy of the Premises and

all areas appurtenant thereto, including parking areas. Charter School's comprehensive auto liability policy shall insure all vehicle(s), whether hired, owned or non-owned. Charter School's commercial general insurance shall be at least as broad as the Insurance Service Office (ISO) CG 00-01 form and in an amount of not less than One Million dollars (\$1,000,000) for bodily injury or death and property damage as a result of any one occurrence and Two Million dollars (\$2,000,000) general aggregate policy limit. In addition, Charter School shall obtain a products/completed operations aggregate policy in the amount of One Million dollars (\$1,000,000). The insurance carrier, deductibles and/or self-insured retentions shall be approved by District, which approval shall not be unreasonably withheld. Prior to the Commencement Date, Charter School shall deliver to District a certificate of insurance, or equivalent documentation, evidencing the existence of the policies required hereunder and copies of endorsements stating that such policies shall:

21.3.1. State the coverage is primary and any coverage by District is in excess thereto;

21.3.2. Contain a cross liability endorsement; and

21.3.3. Include a separate endorsement naming District as an additional insured.

At least thirty (30) days prior to the expiration of each certificate, and every subsequent certificate, Charter School shall deliver to District a new certificate of insurance, or equivalent documentation, consistent with all of the terms and conditions required in connection with the original certificate of insurance as described herein.

21.4. During the Term of this Agreement, District shall maintain at its cost a policy of standard fire and casualty insurance limited to the value of the buildings and improvements located on the School Site as of the Commencement Date. The District's insurance policy shall be primary in the case of any damage or destruction to the Premises (but not to the Charter School's personal property or alterations or improvements constructed by the Charter School).

21.4.1. No use shall be made or permitted to be made of the Premises, nor acts done, that will increase the existing rate of insurance upon the building or buildings of the Premises or cause the cancellation of any insurance policy, covering same, or any part thereof, nor shall Charter School sell, or permit to be kept, used, or sold in or about the Premises any article that may be prohibited by the standard form of fire insurance policies. Charter School shall, at its sole cost and expense, comply with any and all requirements pertaining to the Premises, of any insurance organization or company, necessary for the maintenance of reasonable fire and casualty insurance, covering the Premises' buildings, or appurtenances. Fire and casualty insurance premium increases to District due to equipment and/or activities of Charter School (other than based only on the Charter School's occupancy of the Premises) shall be charged to Charter School.

21.5. During the Term, Charter School shall comply with all provisions of law applicable to Charter School with respect to obtaining and maintaining workers' compensation insurance. Prior to the commencement and any renewal of this Agreement and Charter

School's occupancy of the Premises, Charter School shall provide District, as evidence of this required coverage, a certificate in a form satisfactory to District on or before the commencement or renewal date, providing that insurance coverage shall not be canceled or reduced without thirty (30) days prior written notice to District. If the insurer does not provide such notice, Charter School shall provide the District with notice of cancellation of coverage as soon as it becomes aware of such cancellation.

- 22. Signs.** Charter School may, at Charter School's sole cost, have the right and entitlement to place onsite signs on the Premises to advertise Charter School's educational program, provided Charter School obtains the prior written approval and consent of District. District's approval and consent shall not be unreasonably withheld. Any signs shall be at Charter School's cost and in compliance with the local ordinances pertaining thereto. In connection with the placement of any of Charter School's signs, District agrees to cooperate with Charter School in obtaining any governmental permits which may be necessary. Throughout the Term of the Agreement Charter School shall, at its sole cost and expense, maintain any of its signage and all appurtenances in good condition and repair. At the termination of the Agreement, Charter School shall remove any signs which it has placed on the Premises and School Site, and shall repair any damage caused by the installation or removal of Charter School's signs.
- 23. Notice.** Any notice required or permitted to be given under the Agreement shall be deemed to have been given, served and received if given in writing and personally delivered or either deposited in the United States mail, registered or certified mail, postage prepaid, return receipt required, or sent by overnight delivery service or email, addressed as follows:

**DISTRICT:**

Oakland Unified School District  
Attn: Office of Charter Schools  
1000 Broadway, Suite 398  
Oakland, CA 94607  
charteroffice@ousd.org

**CHARTER SCHOOL:**

Urban Montessori  
Attn: Krishna Feeney  
4551 Steele Street  
Oakland, CA 94619  
krishnaf@urbanmontessori.org

Any notice personally given or sent by email shall be effective upon receipt. Any notice sent by overnight delivery service shall be effective the business day next following delivery thereof to the overnight delivery service. Any notice given by certified or registered mail shall be effective three (3) days after deposit in the United States mail.

- 24. Subcontract, Assignment and Sublease.** Charter School shall not have the right, voluntarily or involuntarily, to assign, license, transfer or encumber the Agreement or sublet all or part of the Premises. Any purported transfer shall be void and shall, at District's election, constitute a default. No consent to transfer shall constitute a waiver of the provisions of this Section.

- 25. Joint and Several Liability.** If Charter School is more than one person or entity, each person or entity shall be jointly and severally liable for the obligations of Charter School hereunder.
- 26. Independent Contractor Status.** The Agreement is by and between two independent entities and is not intended to and shall not be construed to create the relationship of agent, servant, employee, partnership, joint venture, or association.
- 27. Entire Agreement of Parties.** The Agreement constitutes the entire agreement between the Parties and supersedes all prior discussions, negotiations and agreements, whether oral or written. The Agreement may be amended or modified only by a written instrument executed by both Parties. Nothing in this provision shall be construed so as to limit, nullify, abridge or modify the Charter School's obligations under its Charter, or the its authorizer's oversight authority.
- 28. California Law.** The Agreement shall be governed by and the rights, duties and obligations of the Parties shall be determined and enforced in accordance with the laws of the State of California. The Parties further agree that any action or proceeding brought to enforce the terms and conditions of the Agreement shall be maintained in Alameda County.
- 29. Compliance with All Laws.**
- 29.1. Except as otherwise provided in this Agreement, Charter School shall at Charter School's expense comply with all requirements of all governmental authorities, in force either now or in the future, affecting the Charter School's use of the Premises or School Site, and shall faithfully observe in Charter School's use of the Premises all laws, regulations and ordinances of these authorities, in force either now or in the future including, without limitation, all applicable federal, state and local laws, regulations, and ordinances pertaining to air and water quality, hazardous material, waste disposal, air emission and other environmental matters (including the California Environmental Quality Act ("CEQA") and its implementing regulations in Charter School's use of the Premises), and all District policies, rules and regulations ("Environmental Laws").
- 29.2. The judgment of a court of competent jurisdiction, or Charter School's admission in an action or a proceeding against Charter School, whether District be a party to it or not, that Charter School has violated any law or regulation or ordinance in Charter School's use of the Premises shall be considered conclusive evidence of that fact as between District and Charter School. If Charter School fails to comply with any law, regulation or ordinance, District reserves the right to take necessary remedial measures at Charter School's expense, for which Charter School agrees to reimburse District on demand.
- 29.3. Charter School shall not cause or permit any Hazardous Material to be generated, brought onto, used, stored, or disposed of in or about the Premises and any improvements by Charter School or its agents, employees, contractors, subtenants, or invitees, except for limited quantities of standard office, classroom and janitorial supplies (which shall be used and stored in strict compliance with Environmental Laws). Charter School shall comply with all Environmental Laws. As used herein, the term "Hazardous Materials" means any hazardous or toxic substance, material or waste which is or becomes regulated by any local governmental authority, the State of California or the United States Government. The term "Hazardous Materials" includes, without limitation, petroleum

products, asbestos, PCB's, and any material or substance which is (i) defined as hazardous or extremely hazardous pursuant to Title 22 of the California Code of Regulations, Division 4.5, Chapter 11, Article 4, section 66261.30 *et seq.* (ii) defined as a "hazardous waste" pursuant to section (14) of the federal Resource Conservation and Recovery Act, 42 U.S.C. 6901 *et. seq.* (42 U.S.C. 6903), or (iii) defined as a "hazardous substance" pursuant to section 10 of the Comprehensive Environmental Response, Compensation and Liability Act, 42 U.S.C. 9601 *et. seq.* (42 U.S.C. 9601). As used herein, the term "Hazardous Materials Law" shall mean any statute, law, ordinance, or regulation of any governmental body or agency (including the U.S. Environmental Protection Agency, the California Regional Water Quality Control Board and the California Department of Health Services) which regulates the use, storage, release or disposal of any Hazardous Material.

- 29.4. **Notice of Hazardous Substance.** Charter School will promptly notify District in writing if Charter School has or acquires notice or knowledge that any Hazardous Substance has been or is threatened to be, released, discharged, disposed of, transported, or stored on, in, or under or from the Premises or School Site in violation of Environmental Laws. Charter School shall promptly provide copies to District of all written assessments, complaints, claims, citations, demands, fines, inquiries, reports, violations or notices relating to the conditions of the Premises or compliance with Environmental Laws. Charter School shall promptly supply District with copies of all notices, reports, correspondence, and submissions made by Charter School to the United States Environmental Protection Agency, the United States Occupational Safety and Health Administration and any other local, state or federal authority that requires submission of any information concerning environmental matters or Hazardous Substances pursuant to Environmental Laws. Charter School shall promptly notify District of any liens threatened or attached against the Premises pursuant to any Environmental Laws.
- 29.5. **Inspection.** District and District's agents, servants, and employees including, without limitation, legal counsel and environmental consultants and engineers retained by District, may (but without the obligation or duty to do so), at any time and from time to time, on not less than five two (2) business days' notice to Charter School (except in the event of an emergency, in which case, no notice will be required), inspect the Premises to determine whether Charter School is complying with Charter School's obligations set forth in this Section, and to perform environmental inspections and samplings, during regular business hours (except in the event of an emergency) or during such other hours as District and Charter School may agree.
- 29.6. **Indemnification.** Charter School's indemnification and defense obligations in this Agreement shall include any and all Claims arising from any breach of Charter School's covenants under this Section.
- 30. Attorneys' Fees.** If either Party files any action or brings any proceedings against the other arising out of the Agreement, the prevailing party shall be entitled to recover, in addition to its costs of suit and damages, reasonable attorneys' fees to be fixed by the court. The "prevailing party" shall be the Party who is entitled to recover its costs of suit, whether or not suit proceeds to final judgment. No sum for attorneys' fees shall be counted in calculating the amount of a judgment for purposes of determining whether a Party is entitled to its costs or attorneys' fees.

- 31. **Waiver.** The waiver by either Party of any breach of any term, covenant, or condition herein contained shall not be deemed to be a waiver of such term, covenant, condition, or any subsequent breach of the same or any other term, covenant, or condition herein contained.
- 32. **Successors and Assigns.** The Agreement shall be binding upon and inure to the benefit of the Parties hereto and their respective heirs, legal representatives, successors, and assigns.
- 33. **Counterparts.** The Agreement and all amendments and supplements to it may be executed in counterparts, and all counterparts together shall be construed as one document.
- 34. **Captions.** The captions contained in the Agreement are for convenience only and shall not in any way affect the meaning or interpretation thereof nor serve as evidence of the interpretation thereof, or of the intention of the Parties hereto.
- 35. **Severability.** Should any provision of the Agreement be determined to be invalid, illegal or unenforceable in any respect, such provision shall be severed and the remaining provisions shall continue as valid, legal and enforceable.
- 36. **Incorporation of Recitals and Exhibits.** The Recitals and each Exhibit attached hereto are hereby incorporated herein by reference.
- 37. **Authorization to Sign Agreement.** Each individual executing the Agreement on behalf of a Party represents and warrants that he or she is duly authorized to execute and deliver the Agreement on behalf of the Party that the individual is executing the Agreement and that the Agreement is binding upon that Party in accordance with its terms.

ACCEPTED AND AGREED on the date indicated below:

Urban Montessori

  
\_\_\_\_\_

By:

Krishna Feeney

OAKLAND UNIFIED SCHOOL DISTRICT

5/29/20  
\_\_\_\_\_

Date

\_\_\_\_\_  
Jody London, President, Board of Education

\_\_\_\_\_  
Date

\_\_\_\_\_  
Kyla Johnson-Trammel, Superintendent/Secretary, Board of Education

\_\_\_\_\_  
Date

**APPROVED AS TO FORM**

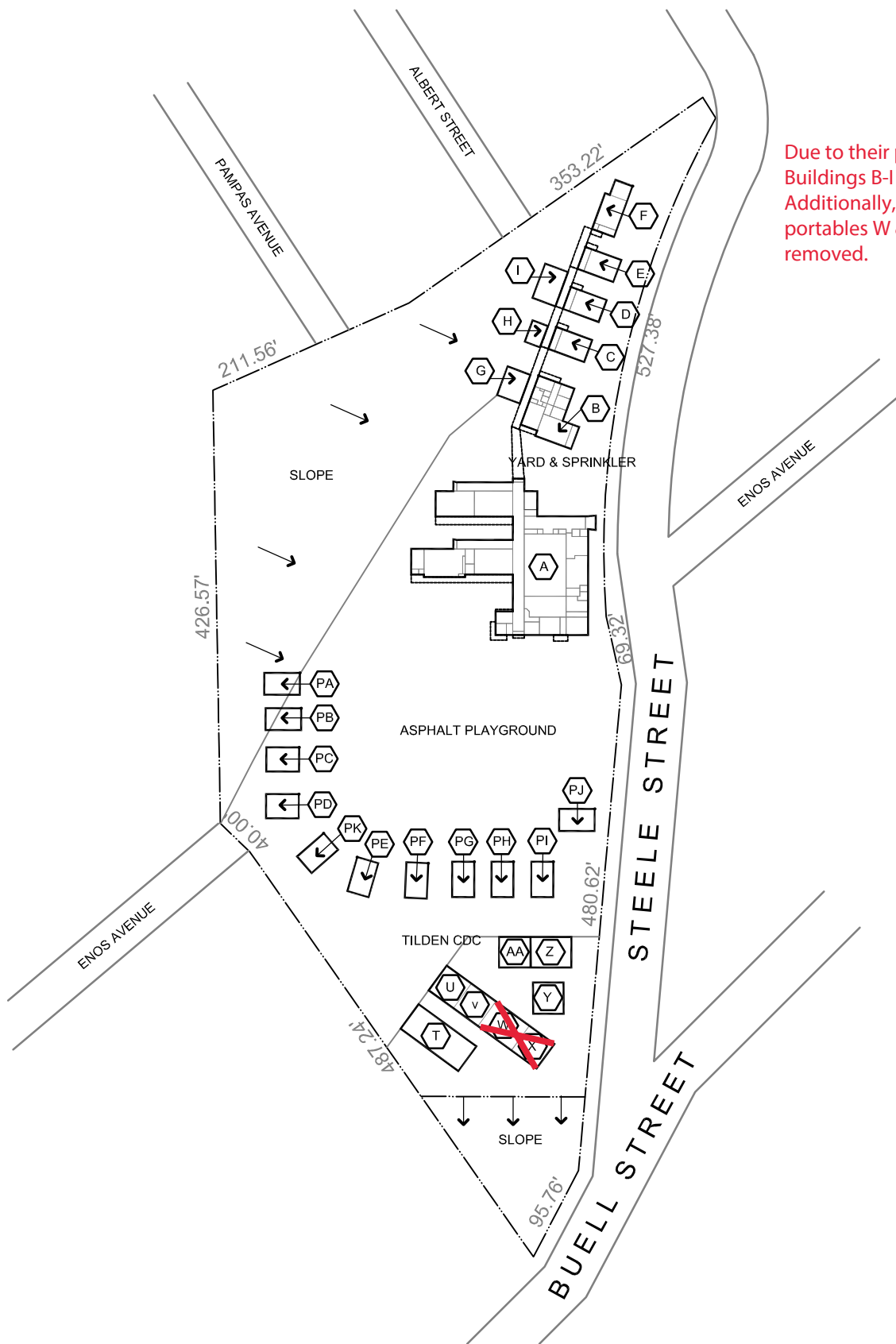
\_\_\_\_\_  
General Counsel's Office

\_\_\_\_\_  
Date

**Exhibit "A"**  
**DESCRIPTION OF PREMISES AND SITE**

The Premises that are being allocated to Charter School shall consist of space located in the room(s) and area(s) as depicted on the attached School Site maps. (Note: the exact rooms (which will include a minimum of 17 classrooms) to be occupied at the Santa Fe campus would be mutually determined by the District and the Charter School.)





Due to their poor condition, Buildings B-I are not included. Additionally, as indicated, portables W & X have been removed.

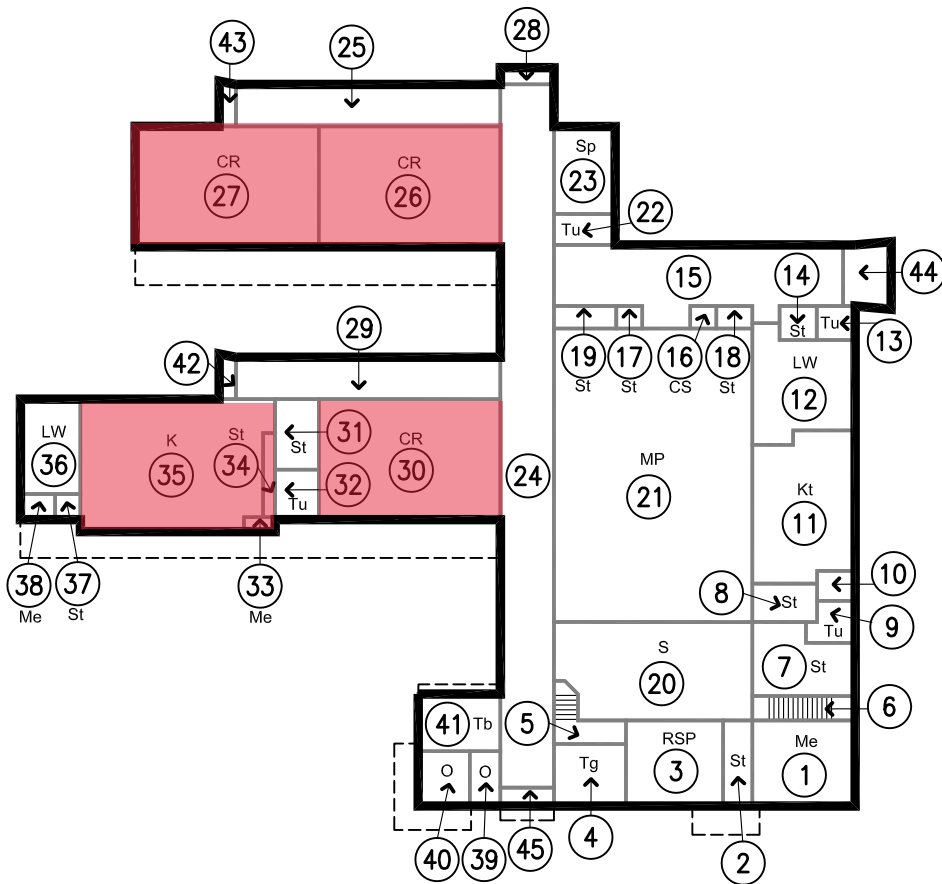
SITE PLAN

156 - JOHN SWETT ELEMENTARY SCHOOL  
4551 STEELE STREET, OAKLAND, CA 94619-2743



Date: 1/18/2013

Scale: 1"=150'-0"



BLDG A - 1ST FLOOR PLAN



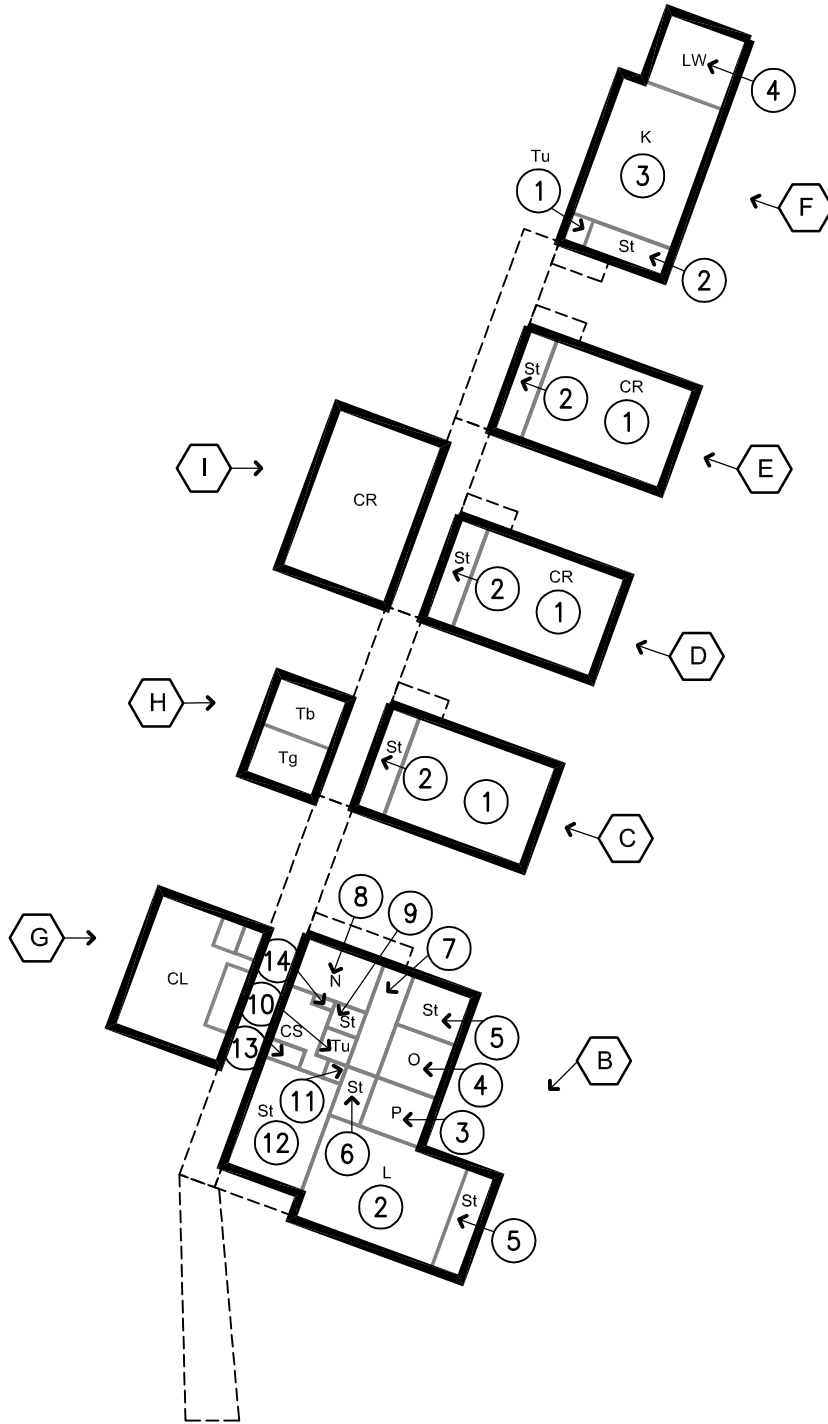
BLDG A - 1ST FLOOR PLAN

156 - JOHN SWETT ELEMENTARY SCHOOL  
 4551 STEELE STREET, OAKLAND, CA 94619-2743



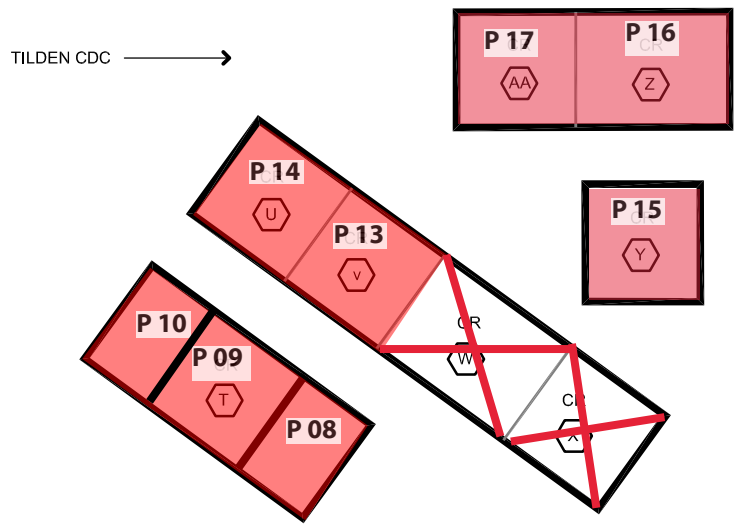
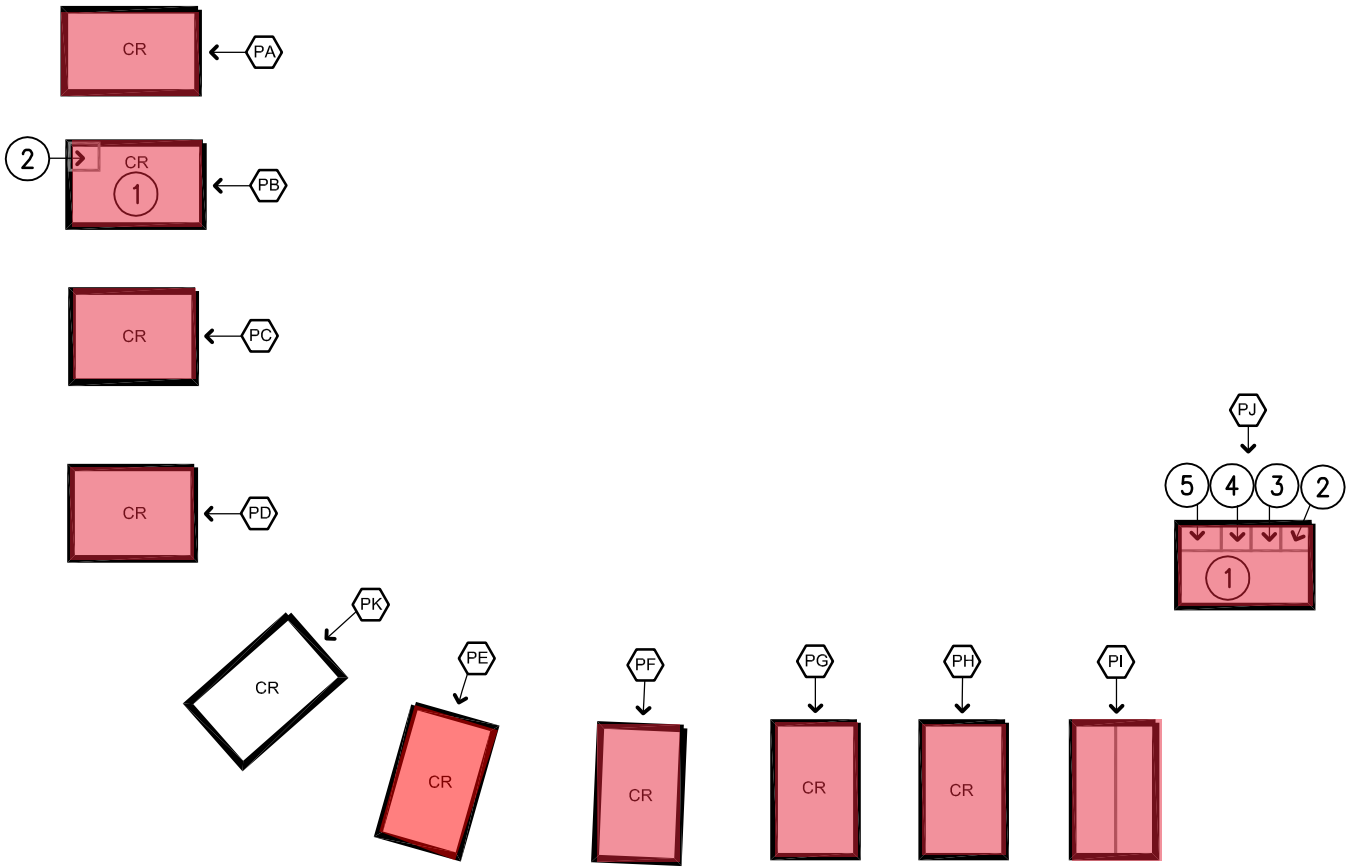
Date: 1/18/2013

Scale: 1"=40'-0"

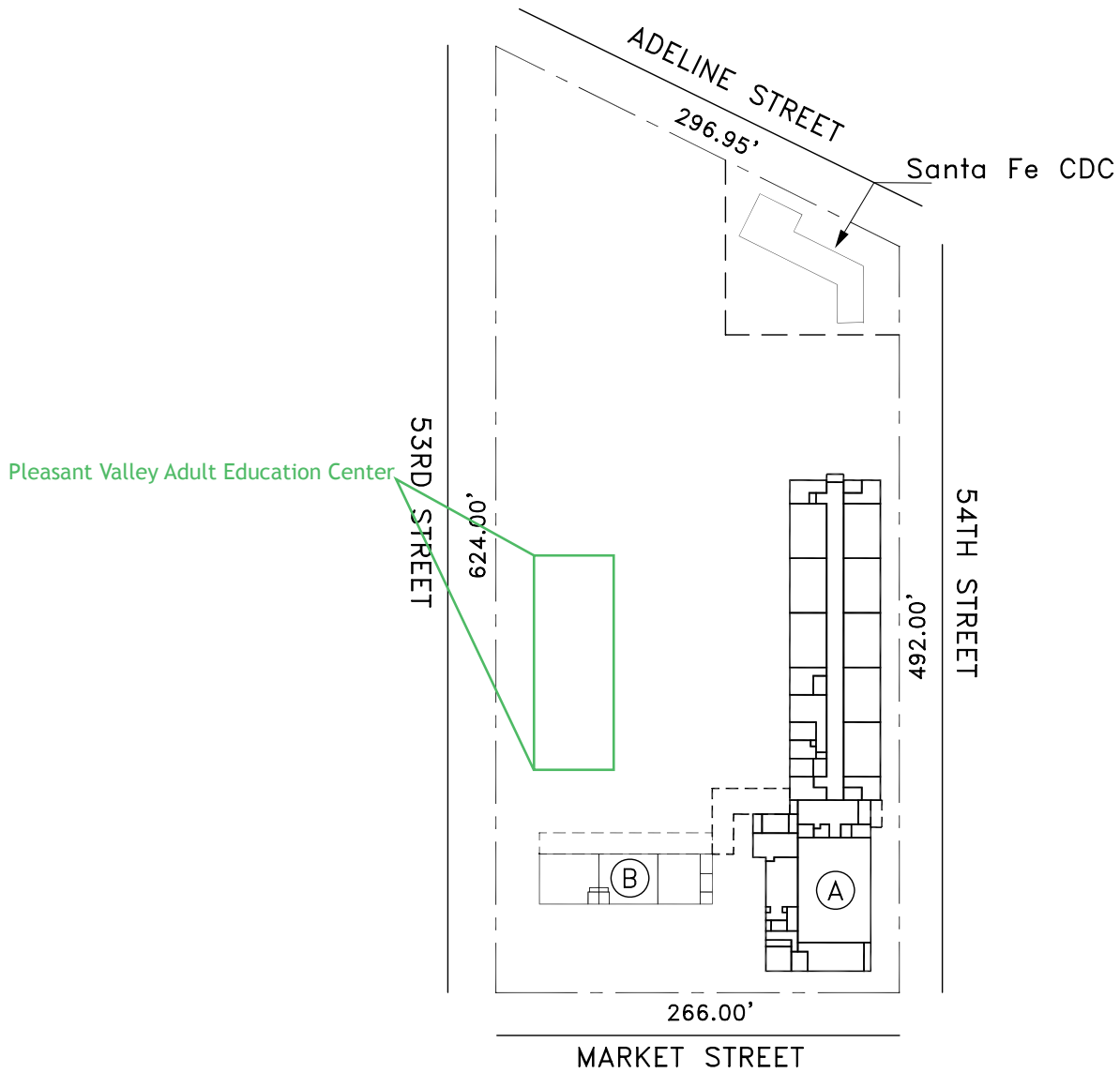


BLDG B-I - 1ST FLOOR PLAN





BLDG PORT A-J & CDC - 1ST FLOOR PLAN



Not drawn to scale

## 150 - Santa Fe Elementary School - Site Plan

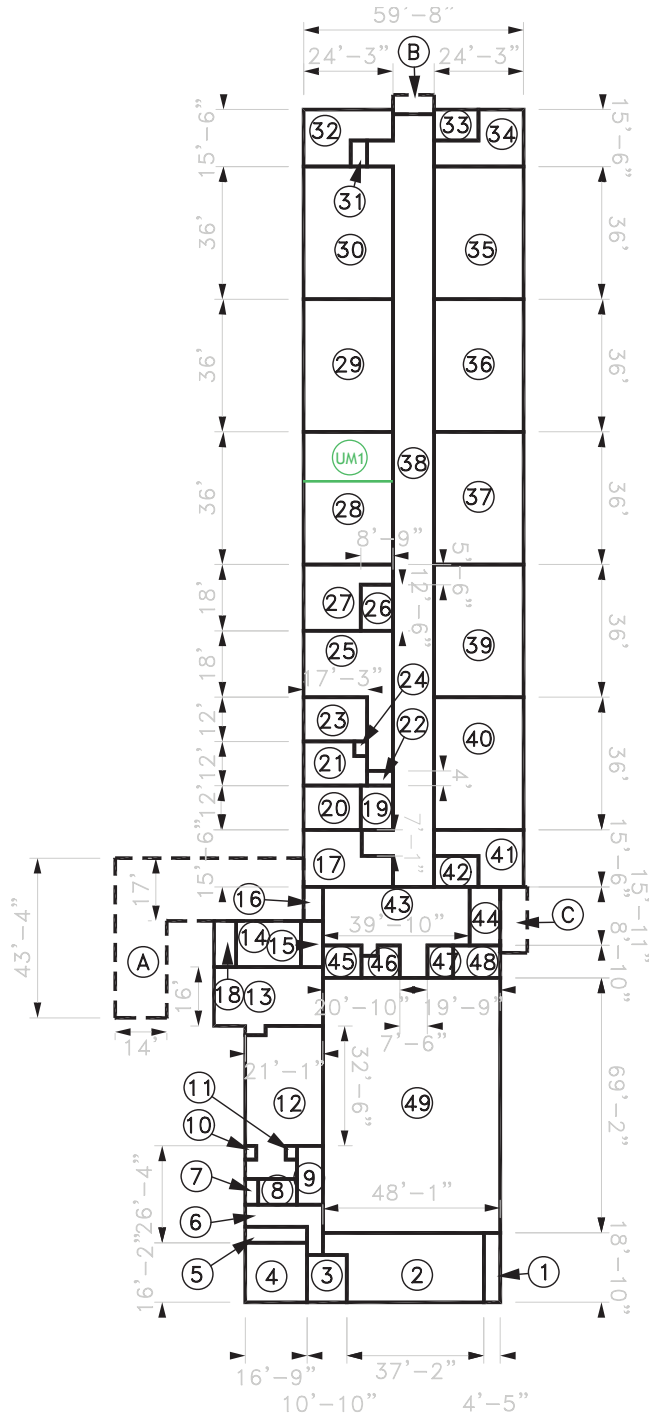
915 54th Street - Oakland, CA 94608-3142

**MKTHINK**

Roundhouse One, 1500 Sansome Street, San Francisco, CA 94111  
 mkthink.com 415 402 0888

2011

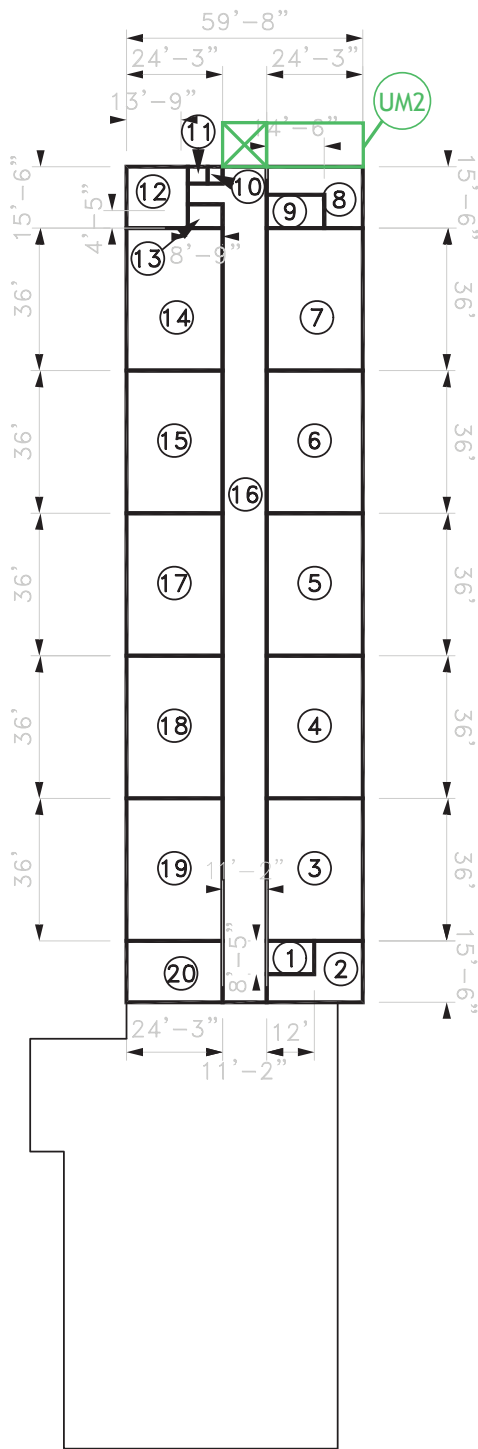




Not drawn to scale

## 150 - Santa Fe Elementary School - Unit A1 (First Floor)

915 54th Street - Oakland, CA 94608-3142



Not drawn to scale



## 150 - Santa Fe Elementary School - Unit A2 (Second Floor)

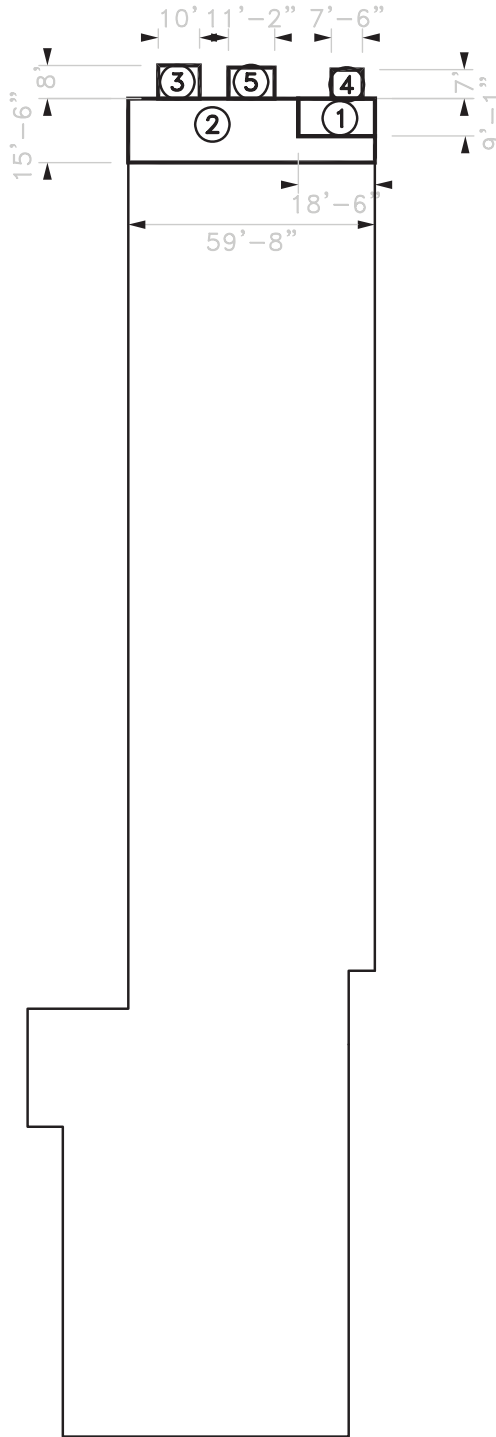
915 54th Street - Oakland, CA 94608-3142

**MKTHINK**

Roundhouse One, 1500 Sansome Street, San Francisco, CA 94111  
mkthink.com 415.402.0888

2011





Not drawn to scale

## 150 - Santa Fe Elementary School - Unit A3 (Basement)

915 54th Street - Oakland, CA 94608-3142

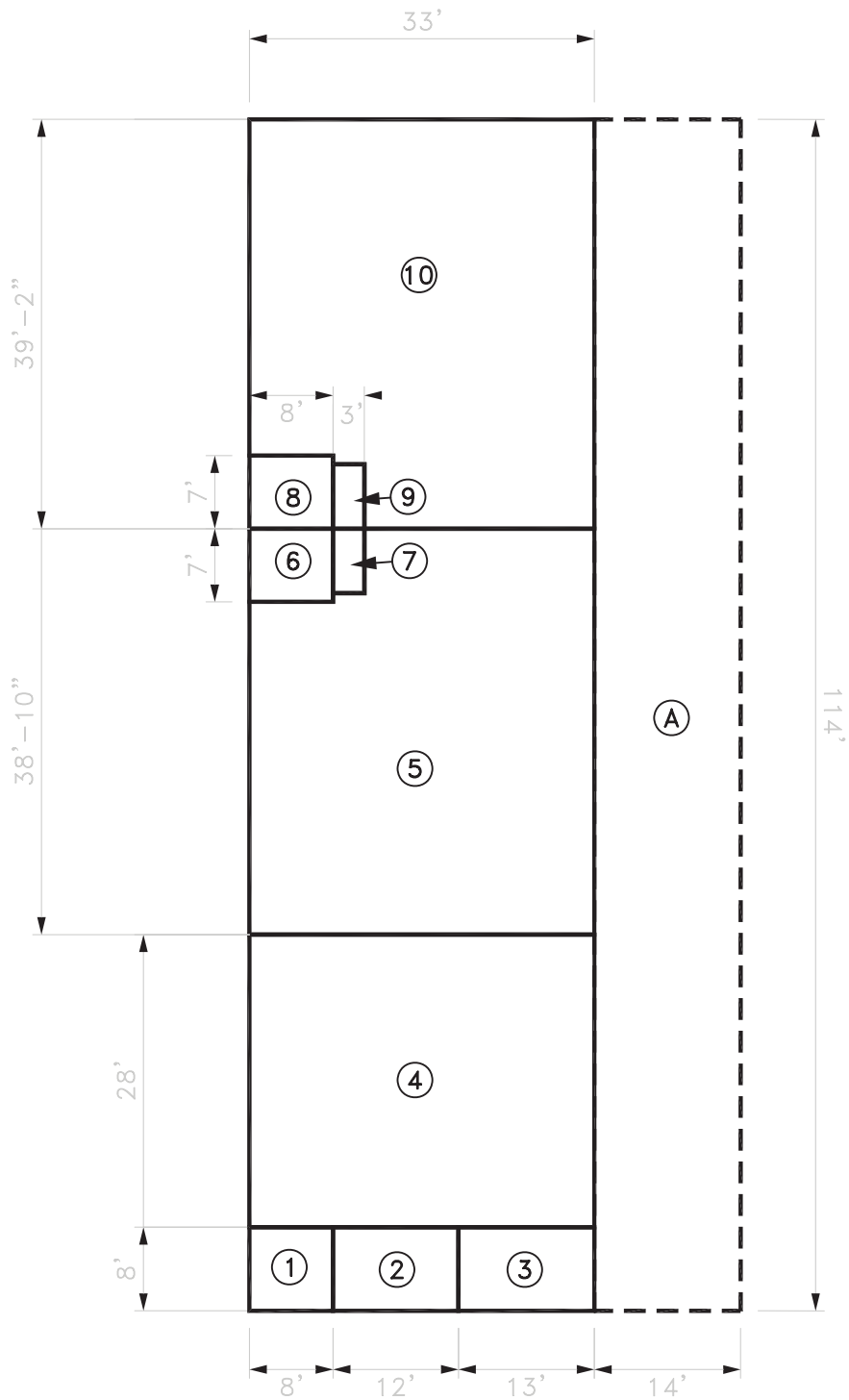
**MKTHINK**

Roundhouse One, 1500 Sansome Street, San Francisco, CA 94111  
 mkthink.com 415 402 0888

2011







Not drawn to scale

## 150 - Santa Fe Elementary School - Unit B

915 54th Street - Oakland, CA 94608-3142

**MKTHINK**

Roundhouse One, 1500 Sansome Street, San Francisco, CA 94111  
mktink.com 415 402 0888

2011



**Urban Montessori**  
**Multi-year Projection**  
**As of May FY2020**

	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>
	<b>2019-20</b>	<b>2020-21</b>	<b>2021-22</b>	<b>2022-23</b>
<b>SUMMARY</b>				
<b>Revenue</b>				
LCFF Entitlement	3,254,077	3,154,352	3,191,445	3,214,948
Federal Revenue	165,755	196,233	160,427	161,263
Other State Revenues	482,585	367,030	365,747	371,718
Local Revenues	135,878	100,896	101,555	102,231
Fundraising and Grants	247,413	203,000	203,000	203,000
<b>Total Revenue</b>	<b>4,285,709</b>	<b>4,021,511</b>	<b>4,022,174</b>	<b>4,053,160</b>
<b>Expenses</b>				
Compensation and Benefits	3,128,863	3,044,279	2,993,336	3,039,548
Books and Supplies	125,351	142,878	143,755	144,413
Services and Other Operating Expenditures	1,041,126	823,942	848,333	852,581
Depreciation	-	-	-	-
Other Outflows	-	4,743	1,779	-
<b>Total Expenses</b>	<b>4,295,340</b>	<b>4,015,841</b>	<b>3,987,203</b>	<b>4,036,542</b>
<b>Operating Income</b>	<b>(9,632)</b>	<b>5,669</b>	<b>34,971</b>	<b>16,618</b>
<b>Fund Balance</b>				
Beginning Balance (Unaudited)	225,801	275,685	281,354	316,326
Audit Adjustment	59,516			
Beginning Balance (Audited)	285,317	275,685	281,354	316,326
Operating Income	(9,632)	5,669	34,971	16,618
<b>Ending Fund Balance</b>	<b>275,685</b>	<b>281,354</b>	<b>316,326</b>	<b>332,944</b>
<b>Total Revenue Per ADA</b>	11,776	10,504	10,403	10,406
<b>Total Expenses Per ADA</b>	11,802	10,489	10,312	10,363
<b>Operating Income Per ADA</b>	(26)	15	90	43
<b>Fund Balance as a % of Expenses</b>	6%	7%	8%	8%

**Urban Montessori**  
**Multi-year Projection**  
**As of May FY2020**

	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>
	<b>2019-20</b>	<b>2020-21</b>	<b>2021-22</b>	<b>2022-23</b>
<b>Key Assumptions</b>				
<b>Enrollment Breakdown</b>				
TK	20	21	22	21
K	69	71	72	72
1	56	59	60	60
2	55	53	53	53
3	50	49	48	48
4	52	39	39	43
5	33	47	36	38
6	24	28	38	27
7	13	22	21	30
8	18	14	18	18
<b>Total Enrolled</b>	<b>390</b>	<b>403</b>	<b>407</b>	<b>410</b>
<b>ADA %</b>				
K-3	92.7%	95.0%	95.0%	95.0%
4-6	93.8%	95.0%	95.0%	95.0%
7-8	96.1%	95.0%	95.0%	95.0%
<b>Average ADA %</b>	<b>93.3%</b>	<b>95.0%</b>	<b>95.0%</b>	<b>95.0%</b>
<b>ADA</b>				
K-3	232	240	242	241
4-6	102	108	107	103
7-8	30	34	37	46
<b>Total ADA</b>	<b>364</b>	<b>383</b>	<b>387</b>	<b>390</b>
<b>Demographic Information</b>				
CALPADS Enrollment (for unduplicated % calc)	393	403	407	410
# Unduplicated (CALPADS)	165	169	171	172
# Free & Reduced Lunch (CALPADS)	132	135	136	137
# ELL (CALPADS)	71	73	74	75
New Students	-	10	4	3
<b>School Information</b>				
FTE's	42.6	40.8	39.9	39.9
Teachers	17	17	17	17
Certificated Pay Increases	7%	0%	0%	0%
Classified Pay Increases	7%	0%	0%	0%
# of school days	-	-	-	-
Default Expense Inflation Rate		0%	0%	0%

**Urban Montessori**  
**Multi-year Projection**  
**As of May FY2020**

	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>
	<b>2019-20</b>	<b>2020-21</b>	<b>2021-22</b>	<b>2022-23</b>
<b>REVENUE</b>				
<b>LCFF Entitlement</b>				
8011 Charter Schools General Purpose Entitlement - State Aid	1,892,264	1,726,678	1,749,600	1,762,476
8012 Education Protection Account Entitlement	444,015	467,088	471,724	475,201
8019 State Aid - Prior Years	4,663	-	-	-
8096 Charter Schools in Lieu of Property Taxes	913,135	960,586	970,120	977,271
<b>SUBTOTAL - LCFF Entitlement</b>	<b>3,254,077</b>	<b>3,154,352</b>	<b>3,191,445</b>	<b>3,214,948</b>
<b>Federal Revenue</b>				
8181 Special Education - Entitlement	57,495	49,125	50,375	50,875
8220 Child Nutrition Programs	42,503	45,105	45,553	45,889
8291 Title I	45,694	45,694	45,694	45,694
8292 Title II	8,805	8,805	8,805	8,805
8294 Title IV	10,000	10,000	10,000	10,000
8297 PY Federal - Not Accrued	1,259	-	-	-
8299 CARES Funding	-	37,504	-	-
<b>SUBTOTAL - Federal Revenue</b>	<b>165,755</b>	<b>196,233</b>	<b>160,427</b>	<b>161,263</b>
<b>Other State Revenue</b>				
8319 Other State Apportionments - Prior Years	4,259	-	-	-
8381 Special Education - Entitlement (State	195,799	236,311	233,866	239,140
8382 Special Education Reimbursement (State	39,600	39,600	39,600	39,600
8520 Child Nutrition - State	2,082	2,209	2,231	2,248
8545 School Facilities Apportionments	147,719	-	-	-
8550 Mandated Cost Reimbursements	6,719	6,136	6,455	6,519
8560 State Lottery Revenue	78,685	82,773	83,595	84,211
8590 COVID-19 LEA Response Funds	7,723	-	-	-
<b>SUBTOTAL - Other State Revenue</b>	<b>482,585</b>	<b>367,030</b>	<b>365,747</b>	<b>371,718</b>
<b>Local Revenue</b>				
8634 Food Service Sales	25,628	26,271	26,930	27,606
8676 After School Program Revenue	31,427	-	-	-
8699 All Other Local Revenue	4,199	-	-	-
8702 Oakland Measure G1	74,625	74,625	74,625	74,625
<b>SUBTOTAL - Local Revenue</b>	<b>135,878</b>	<b>100,896</b>	<b>101,555</b>	<b>102,231</b>
<b>Fundraising and Grants</b>				
8801 Walkathon	106	25,000	25,000	25,000
8802 Private Grants	181,654	125,000	125,000	125,000
8803 All In for Learning	22,000	25,000	25,000	25,000
8811 Fall Campaign	15,737	15,000	15,000	15,000
8812 Other Fundraising (Movie Night, Apparel, etc)	11,443	10,000	10,000	10,000
8814 Field Trips Donations	16,473	3,000	3,000	3,000
<b>SUBTOTAL - Fundraising and Grants</b>	<b>247,413</b>	<b>203,000</b>	<b>203,000</b>	<b>203,000</b>
<b>TOTAL REVENUE</b>	<b>4,285,709</b>	<b>4,021,511</b>	<b>4,022,174</b>	<b>4,053,160</b>

**Urban Montessori**  
**Multi-year Projection**  
**As of May FY2020**

	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>
	<b>2019-20</b>	<b>2020-21</b>	<b>2021-22</b>	<b>2022-23</b>
<b>EXPENSES</b>				
<b>Compensation &amp; Benefits</b>				
<b>Certificated Salaries</b>				
1100 Teachers Salaries	745,426	726,571	726,571	726,571
1103 Teacher - Substitute Pay	22,912	10,000	10,000	10,000
1148 Teacher - Special Ed	325,959	327,138	327,138	327,138
1170 Teacher - Custom 3	-	50,000	55,000	55,000
1300 Certificated Supervisor & Administrator Salaries	115,000	109,250	115,000	115,000
1322 Cert Admin - Custom 2	91,048	86,496	91,048	91,048
<b>SUBTOTAL - Certificated Salaries</b>	<b>1,300,345</b>	<b>1,309,455</b>	<b>1,324,757</b>	<b>1,324,757</b>
<b>Classified Salaries</b>				
2100 Classified Instructional Aide Salaries	670,978	657,623	657,623	657,623
2102 Classified- Counselors	145,127	133,426	133,426	133,426
2103 Classified- Substitutes	6,435	-	-	-
2105 Classified- Reading Specialist	61,274	61,274	61,274	61,274
2400 Classified Clerical & Office Salaries	147,725	138,820	82,660	82,660
2900 Classified Other Salaries	101,198	103,215	103,215	103,215
<b>SUBTOTAL - Classified Salaries</b>	<b>1,132,737</b>	<b>1,094,358</b>	<b>1,038,198</b>	<b>1,038,198</b>
<b>Employee Benefits</b>				
3100 STRS	295,150	274,445	264,889	299,282
3300 OASDI-Medicare-Alternative	79,117	78,532	78,250	78,250
3400 Health & Welfare Benefits	267,674	235,673	236,381	248,200
3500 Unemployment Insurance	12,234	10,952	10,691	10,691
3600 Workers Comp Insurance	41,606	40,865	40,170	40,170
<b>SUBTOTAL - Employee Benefits</b>	<b>695,781</b>	<b>640,466</b>	<b>630,381</b>	<b>676,593</b>
<b>Books &amp; Supplies</b>				
4100 Approved Textbooks & Core Curricula Materials	-	15,000	15,000	15,000
4200 Books & Other Reference Materials	102	1,000	1,000	1,000
4315 Custodial Supplies	2,000	-	-	-
4320 Educational Software	4,069	4,000	4,000	4,000
4325 Instructional Materials & Supplies	6,181	8,000	8,000	8,000
4326 Art & Music Supplies	12,154	5,000	5,000	5,000
4330 Office Supplies	4,000	4,000	4,000	4,000
4335 PE Supplies	542	1,000	1,000	1,000
4340 SpEd Materials & Supplies	750	1,500	1,500	1,500
4410 Classroom Furniture, Equipment & Supplies	1,795	2,000	2,000	2,000
4420 Computers: individual items less than \$5k	5,000	5,000	5,000	5,000
4430 Non Classroom Related Furniture, Equipment & Supplies	944	2,000	2,000	2,000
4710 Student Food Services	83,278	88,378	89,255	89,913
4720 Other Food	4,536	6,000	6,000	6,000
<b>SUBTOTAL - Books and Supplies</b>	<b>125,351</b>	<b>142,878</b>	<b>143,755</b>	<b>144,413</b>
<b>Services &amp; Other Operating Expenses</b>				
5215 Travel - Mileage, Parking, Tolls	500	500	500	500
5305 Dues & Membership - Professional	6,000	6,000	6,000	6,000
5450 Insurance - Other	40,839	64,168	64,168	64,168
5515 Janitorial, Gardening Services & Supplies	120,000	80,000	80,000	80,000
5520 Security	608	600	600	600
5530 Utilities- Pleasant	29,000	-	-	-
5535 Utilities- Brann	55,911	50,000	50,000	50,000
5605 Equipment Leases	14,024	14,024	14,024	14,024

**Urban Montessori**  
**Multi-year Projection**  
**As of May FY2020**

	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>
	<b>2019-20</b>	<b>2020-21</b>	<b>2021-22</b>	<b>2022-23</b>
5610 Brann Rent	77,353	174,000	174,000	174,000
5615 Repairs and Maintenance - Building	5,000	5,000	5,000	5,000
5631 Jarlath Rent	264,000	-	-	-
5803 Accounting Fees	12,630	19,300	19,300	19,300
5805 Administrative Fees	6,386	6,386	6,386	6,386
5809 Banking Fees	768	600	600	600
5812 Business Services	112,000	114,000	118,000	122,000
5815 Consultants - Instructional	25,000	2,500	2,500	2,500
5824 District Oversight Fees	34,322	33,270	33,661	33,909
5826 Directors Contingency	-	45,000	45,000	45,000
5827 Middle School Program expenses (8816 offset)	1,808	1,808	1,808	1,808
5830 Field Trips Expenses	45,409	3,000	3,000	3,000
5833 Fines and Penalties	500	500	500	500
5836 Fingerprinting	1,595	1,595	1,595	1,595
5839 Fundraising Expenses	5,532	5,000	5,000	5,000
5843 Interest - Loans Less than 1 Year	-	5,000	5,000	5,000
5845 Legal Fees	10,583	15,000	15,000	15,000
5851 Marketing and Student Recruiting	-	3,500	3,500	3,500
5857 Payroll Fees	6,000	6,000	6,000	6,000
5860 Printing and Reproduction	10,000	7,500	7,500	7,500
5861 Prior Yr Exp (not accrued)	11,986	-	-	-
5863 Professional Development	13,615	13,000	13,000	13,000
5869 Special Education Contract Instructors	62,750	85,000	90,000	90,000
5875 Staff Recruiting	4,000	4,000	4,000	4,000
5878 Student Assessment	5,000	5,000	5,000	5,000
5880 Student Health Services	3,500	5,000	5,000	5,000
5881 Student Information System	29,817	23,000	23,000	23,000
5884 Substitutes	-	-	15,000	15,000
5887 Technology Services	3,000	3,000	3,000	3,000
5910 Communications - Internet / Website Fees	9,492	9,492	9,492	9,492
5915 Postage and Delivery	3,200	3,200	3,200	3,200
5920 Communications - Telephone & Fax	9,000	9,000	9,000	9,000
<b>SUBTOTAL - Services &amp; Other Operating Exp.</b>	<b>1,041,126</b>	<b>823,942</b>	<b>848,333</b>	<b>852,581</b>
<b>Depreciation Expense</b>				
<b>SUBTOTAL - Depreciation Expense</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Other Outflows</b>				
7438 Long term debt - Interest	-	4,743	1,779	-
<b>SUBTOTAL - Other Outflows</b>	<b>-</b>	<b>4,743</b>	<b>1,779</b>	<b>-</b>
<b>TOTAL EXPENSES</b>	<b>4,295,340</b>	<b>4,015,841</b>	<b>3,987,203</b>	<b>4,036,542</b>

**Urban Montessori Charter School**  
**Financial Impact of Relocating to Single Site**

	2019-20	2020-21	Net Change
<b>Revenue</b>			
School Facilities Apportionment	\$ 174,719.00	\$ -	\$ (174,719.00)
<b>Total</b>	<b>\$ 174,719.00</b>	<b>\$ -</b>	<b>\$ (174,719.00)</b>
<b>Expense</b>			
Janitorial	\$ 120,000.00	\$ 80,000.00	\$ 40,000.00
Utilities	\$ 84,911.00	\$ 50,000.00	\$ 34,911.00
Prop 39 Rent	\$ 77,353.00	\$ 146,708.00	\$ (69,355.00)
Rent	\$ 264,000.00	\$ -	\$ 264,000.00
Repairs and Maintenance	\$ 5,000.00	\$ 5,000.00	\$ -
<b>Total</b>	<b>\$ 551,264.00</b>	<b>\$ 281,708.00</b>	<b>\$ 269,556.00</b>
Net Facilities Savings			\$ 94,837.00

<b>Driving Assumptions</b>
1. No longer receiving SB740 due to single-site relocation at Prop 39 facility
2. Decreased janitorial expenses due to single-site occupancy
3. Decreased utilities expenses due to single-site occupancy
4. Assuming Prop 39 rent based on District's proposal
5. No longer paying for private facilities rent
6. Repairs and maintenance remains the same

**Urban Montessori Charter School**  
**Financial Impact of Relocating to Single Site**

	2021-22	2022-23	Net Change from FY21
<b>Revenue</b>			
School Facilities Apportionment	\$ -	\$ -	\$ -
<b>Total</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>
<b>Expense</b>			
Janitorial	\$ 80,000.00	\$ 80,000.00	\$ -
Utilities	\$ 50,000.00	\$ 50,000.00	\$ -
Prop 39 Rent	\$ 146,708.00	\$ 146,708.00	\$ -
Rent	\$ -	\$ -	\$ -
Repairs and Maintenance	\$ 5,000.00	\$ 5,000.00	\$ -
<b>Total</b>	<b>\$ 281,708.00</b>	<b>\$ 281,708.00</b>	<b>\$ -</b>
Net Facilities Savings			\$ -

<b>Driving Assumptions</b>
<ol style="list-style-type: none"> <li>1. Assuming 0% COLA in State funding</li> <li>2. Assuming 0% COLA for expenses</li> <li>3. Charter is committed to reduction in expenses, or maintenance of current expenses if funding is flat at State level</li> </ol>





**Charter Petition**

**For a term of July 1, 2017 - June 30, 2022**

**Submitted by:**

**David Castillo**

**Head of School and Lead Petitioner**

**Submitted on:**

**January 3, 2017**

**Material Revision Submitted on: June 26, 2020**

**Submitted to:**

**ALAMEDA COUNTY OFFICE OF EDUCATION**

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## AFFIRMATIONS AND ASSURANCES DECLARATION

As the authorized lead petitioner, I, David Castillo, hereby certify that the information submitted in this petition for a California public charter school to be named Urban Montessori Charter School (the “School” or “Urban Montessori”) to be submitted to the Alameda County Office of Education (“ACOE” or the “County”) is true to the best of my knowledge and belief; I also certify that this petition does not constitute the conversion of any private schools to the status of public charter schools; and further, I understand that if awarded a charter, the School will follow any and all federal, state, and local laws and regulations that apply to the School, including but not limited to:

- The School shall meet all statewide standards and conduct the student assessment tests pursuant to Education Code Section 60605, and any other statewide standards authorized in statute, or student assessments applicable to children in non-charter public schools. [Ref. Education Code Section 47605(~~ed~~)(1)]
- The School declares that it shall be deemed the exclusive public schools employer of the employees of Urban Montessori Charter School for purposes of the Educational Employment Relations Act. [Ref. Education Code Section 47605 (~~cb~~)(~~65~~)(~~O~~)]
- The School shall be nonsectarian in its programs, admissions, policies, governance, employment practices, and all other operations. [Ref. Education Code Section 47605(~~ed~~)(1)]
- The School shall not charge tuition, fees, or other mandatory payments for attendance at the charter schools or for participation in programs that are required for children. [Ref. Education Code Section 47605(~~ed~~)(1)]
- The School shall not discriminate on the basis of the characteristics listed in Section 220 (actual or perceived disability, gender, gender identity, gender expression, nationality, race, color, or ethnicity, religion, sexual orientation, or any other characteristic that is contained in the definition of hate crimes set forth in Section 422.55 of the Penal Code, including immigration status, or association with an individual who has any of the aforementioned characteristics). The School shall further not discriminate on the basis of creed, ancestry, athletic performance, special need, proficiency in the English language or a foreign language, or academic achievement. [Ref. Education Code Section 47605(~~ed~~)(1)]
- The School shall admit all pupils who wish to attend Urban Montessori Charter School, and who submit a timely application, unless Urban Montessori Charter School receives a greater number of applications than there are spaces for children, in which case each application will be given equal chance of admission through a public random drawing process. Except as required by Education Code Section 47605(~~de~~)(2), admission to Urban Montessori Charter School shall not be determined according to the place of residence of the student or of that student's his or her parents or legal guardian within the State. Preference in the public random drawing shall be given as required by Education Code Section 47605(~~ed~~)(2)(B)(~~i~~)-(iv). In the event of a drawing, the chartering authority shall make reasonable efforts to accommodate the growth of the Charter Schools in accordance with Education Code Section 47605(~~de~~)(2)(C). [Ref. Education Code Section 47605(~~ed~~)(2)(A)-(CB)]
- The School shall adhere to all provisions of federal law related to children with disabilities including, but not limited to the Individuals with Disabilities in Education Improvement Act of 2004 (“IDEIA”), Section 504 of the Rehabilitation Act of 1973 (“Section 504”), and Title II of the Americans with Disabilities Act of 1990 (“ADA”).
- The School shall meet all requirements for employment set forth in applicable provisions of law, including, but not limited to credentials, as necessary. [Ref. Title 5 California Code of Regulations Section 11967.5.1(f)(5)(C)]

- The School shall ensure that teachers in Urban Montessori Charter School hold at the Commission on Teacher Credentialing certificate, permit, or other document required for the teacher's certificated assignment~~equivalent to that which a teacher in other public schools are required to hold. As allowed by statute, flexibility will be given to non-core, non-college preparatory teachers.~~ The School may use local assignment options authorized in statute and regulations for the purpose of legally assigning certificated teachers, in the same manner as a governing board of a school district. Teachers employed by charter schools during the 2019–20 school year shall have until July 1, 2025, to obtain the certificate required for the teacher's certificated assignment. [Ref. California Education Code Section 47605(l) and 47605.4(a)]
- The School shall at all times maintain all necessary and appropriate insurance coverage.
- The School shall, for each fiscal year, offer at a minimum, the number of minutes of instruction per grade level as required by Education Code Section 47612.5(a)(1)(A)-(D)
- If a pupil is expelled or leaves Urban Montessori Charter School without graduating or completing the school year for any reason, Urban Montessori Charter School shall notify the superintendent of the school district of the pupil's last known address within 30 days, and shall, upon request, provide that school district with a copy of the cumulative record of the pupil, including report cards or a transcript of grades or report card, and health information. If the pupil is subsequently expelled or leaves the school district without graduating or completing the school year for any reason, the school district shall provide this information to the School within 30 days if the School demonstrates that the pupil had been enrolled in the School. [Ref. California Education Code Section 47605(~~de~~)(3)]
- The School may encourage parental involvement, but shall notify the parents and guardians of applicant pupils and currently enrolled pupils that parental involvement is not a requirement for acceptance to, or continued enrollment at, the School. [Ref. Education Code Section 47605(n)]
- The School shall maintain accurate and contemporaneous written records that document all pupil attendance and make these records available for audit and inspection. [Ref. California Education Code Section 47612.5(a)(2)]
- The School shall on a regular basis consult with its parents and teachers regarding the School's education programs. [Ref. California Education Code Section 47605(~~de~~)]
- The School shall comply with any jurisdictional limitations to locations of its facilities. [Ref. California Education Code Section 47605-47605.1]
- The School shall comply with all laws establishing the minimum and maximum age for public school enrollment. [Ref. California Education Code Section 47612(b), 47610]
- The School shall comply with all applicable portions of the No Child Left Behind Elementary and Secondary Education Act, as reauthorized and amended by the Every Student Succeeds Act ("ESSA").
- The School shall comply with the Public Records Act.
- The School will adhere to all applicable provisions of federal law relating to children who are English Learners, including Title VI of the Civil Rights Act of 1964; and the Equal Educational Opportunities Act of 1974.
- The School shall comply with the Family Educational Rights and Privacy Act.
- The School shall comply with the Ralph M. Brown Act.
- The School shall comply with Government Code Section 1090, et seq., as set forth in Education Code Section 47604.1.
- The School shall comply with the Political Reform Act.
- The School shall meet or exceed the legally required minimum of school days applicable to charter schools. [Ref. Title 5 California Code of Regulations Section 11960]
- Urban Montessori declares that it shall be deemed the exclusive public school employer of Urban Montessori teachers, staff and other employees of Urban Montessori for purposes of

the Educational Employment Relations Act. Urban Montessori recognizes the employees' rights under the EERA provisions to organize for collective bargaining.

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David Castillo,  
Head of School and Lead Petitioner

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Date



## EXECUTIVE SUMMARY

### THE MISSION OF URBAN MONTESSORI CHARTER SCHOOL

Urban Montessori Charter School’s mission is to develop self-directed and engaged learners who are academically, socially and emotionally prepared to succeed in any high school. Nurturing the innovators of tomorrow to creatively meet the challenges of today’s world with confidence, compassion and grace, Urban Montessori cultivates individual curiosities and strengths, while holding children to a high standard of excellence. At Urban Montessori, children deepen their understanding of what it means to live responsibly in a diverse urban community.

### WHO WE SERVE

Urban Montessori is a public charter school serving TK through 8th grade children located in Oakland Unified School District to maximize the diversity and beauty of our vibrant urban community. We serve a socio-economically, racially and culturally diverse community of children because we believe that children learn about different backgrounds and perspectives by living and working with people from those backgrounds and perspectives. In addition, our long-term goal is to open a Montessori preschool program that allows us to provide a free and public Montessori preschool option to families who currently cannot access a private school option. In this way, we will provide a complete Montessori experience to our children.

The demographics of our student population, alongside that of OUSD, Alameda County, and the State of California for 2014-15 are detailed in **Figure ES-1**.

**Figure ES-1 2014-15 Student Demographics**

2014-15 Student Demographics				
Students who are:	UMCS	OUSD	County	State
White	33.7%	9.8%	20.2%	24.6%
Latino	25.1%	33.8%	33.6%	53.6%
African-American	19.4%	26.7%	11.6%	6.0%
English Language Learners	19.7%	32.3%	21.9%	22.3%
Reclassified English Proficient (R-FEP)	7.1%	4.2%	10.9%	11.0%
Socio-economically disadvantaged	36.2%	74.5%	43.9%	58.6%
Identified as having Special Needs (IEP)	11%	11.3%	10.6%	11.5%

Sources: [www.ed-data.org](http://www.ed-data.org) and [www.kids-data.org](http://www.kids-data.org)

## HIGHLIGHTS OF THE MODEL

### What will children experience at Urban Montessori Charter School?

Children who attend Urban Montessori are well educated and able to use their knowledge flexibly in novel contexts. They have effective teachers, trained in Montessori methods, national and state standards, current research and best practices. Urban Montessori children enjoy learning to think creatively and critically through all subject areas, including math, language arts, science, history/social studies, world language, physical education, music, arts and design. Children have extended blocks of uninterrupted learning time that allow for concentration and practice. Moreover, they collaborate with other children regularly on Design Challenges<sup>1</sup> that make problem solving and creative thinking an integral part of the Urban Montessori experience. Other characteristics of Urban Montessori include:

- Multi-age classrooms that enhance peer tutoring and modeling opportunities, provide the developmental time to master learning goals, and build strong learning communities
- Individualized lessons that support differentiated instruction and opportunities for practice in a carefully prepared classroom environment
- Use of proven learning materials and manipulatives that drive curiosity, teach respect, and provide opportunities for children to engage in authentic tasks
- Low adult-to-child ratio to maximize opportunities for differentiation and self-directed learning
- Visual arts integrated across the curriculum and into Design Challenges
- Instruction about the disciplines of music and visual arts, including techniques and history
- Authentic and varied assessments, including state-mandated tests
- Curriculum and assessments designed to foster and evaluate deep understanding of content and ideas
- Technology integration that sets children up for success in the 21<sup>st</sup> century
- World language learning opportunities
- Teacher collaboration that facilitates improved learning for children

### What is Montessori?

Montessori is a comprehensive pedagogy, curriculum, and philosophy intended to maximize the potential of every child's academic, social, emotional and intellectual development based on the research of Dr. Maria Montessori. The Montessori philosophy supports a differentiated, self-directed program for each child, embracing his or her natural curiosity and love of learning. In a Montessori classroom, children are given the freedom to work actively with concrete, sequential materials within a carefully prepared environment. The curriculum is designed to meet the needs of every child – from special-needs children to high-achievers. Teachers provide enough guidance to help children work toward independence and self-discipline, which translates into an environment that encourages self-direction and personal responsibility. A multi-age classroom provides maximum opportunities for developing the social and academic skills of all learners.

Dr. Montessori was a constructivist in close alignment with child development experts like Jean Piaget and Lev Vygotsky.<sup>2</sup> Constructivism is a philosophy of learning based on the premise that by reflecting on our experiences, we construct our own understanding of the world we live in. We individually generate our own “rules” and “mental models,” which we then use to make sense of our experiences. Learning is then a process of adjusting our mental models to assimilate and incorporate new

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<sup>1</sup> Design Challenges are explained in greater detail on page 18 of the charter.

<sup>2</sup> Bodrova, E. (2003). Vygotsky and Montessori: One Dream, Two Visions. *Montessori Life*.

experiences. Both Piaget and Montessori believed children develop in a progression sequence. Both recommended children learn through hands-on, multi-modality activities where they are focused on creating mental models versus rote memorization of facts, where there are multiple measures of assessing learning, and where children' prior knowledge is incorporated into the curriculum.<sup>3</sup>

The Montessori method is in close alignment with child development and current brain research<sup>4</sup>, but unlike the contributions of Vygotsky or Piaget, Montessori provided more than just research or beliefs about how children learn. The Montessori program is a comprehensive instructional system which comes with extensive teacher training and certification, specific instructional materials and assessments covering all disciplines, proven instructional strategies and methods, clear goals and standards for mastery, and aligned curriculum and materials around classroom culture and management – all developed from a strong theoretical foundation.

- [Please see Appendix A-5 for a Detailed Explanation of the Montessori Method](#)
- [Please see Appendix A-6 for Two Research Studies on the Effectiveness of the Montessori Approach](#)

## ELIGIBILITY FOR RENEWAL

### Strong Student Outcomes

Urban Montessori has a proven track record of success in serving the students of Oakland. This success can be seen through a variety of measures.

Education Code § 47607 (3) (A) requires the authorizer to consider as the most important factor for charter school renewal, “increases in pupil achievement for all groups of pupil served by the charter school.” Prerequisite to the submittal of the Charter Renewal Application, governed by the “standards and criteria” in Education Code § 47605, a charter school must demonstrate its eligibility for renewal by meeting the minimum standard for renewal delineated in Education Code § 47607(b) which requires that the charter school met “at least one of the following criteria:

1. Attained its Academic Performance Index (API) growth target in the prior year or in two of the last three years both schoolwide and for all groups of pupils served by the charter school.
2. Ranked in deciles 4 to 10 inclusive, on the API in the prior year or in two of the last three years.
3. Ranked in deciles 4 to 10 inclusive, on the API for a demographically comparable school in the prior year or in two of the last three years.
4. The entity that granted the charter determines that the academic performance of the public school is at least equal to the academic performance of the public schools that the charter school pupils would otherwise have been required to attend, as well as the academic performance of the school in the school district in which the charter school is located, taking into account the composition of the pupil population that is served at the charter school.

Based on the shift to Common Core State Standards and the revamping of the state accountability system, three of the data points listed above are no longer available (criteria one through three). Urban Montessori believes that it meets criteria four and has “clear and convincing data” to support this assertion as required by Education Code § 47607(B)(i).

In looking at academic performance data, Urban Montessori’s performance is “at least equal to the academic performance of the public schools that the charter school pupils would otherwise have been

<sup>3</sup> Elkind, D. (1967). Piaget and Montessori. *Harvard Educational Review*. 37: 535-546.

<sup>4</sup> Mariale M. Hardiman. *Connecting brain research with effective teaching: the Brain-Targeted* (Lanham, MD: Rowman and Littlefield Education, 2003).

required to attend” and often exceeds it. This can be seen in performance on the California Assessment of Student Progress and Proficiency (CAASPP), NWEA MAP, Attendance Rates, and Stakeholder Surveys.

### CAASPP

In looking at proficiency in English Language Arts and Math, Urban Montessori compares favorably to the schools which students would otherwise attend as seen in the district average and in rankings for overall proficiency - and even more importantly growth.

In English Language ARts (ELA), Urban Montessori ranked:

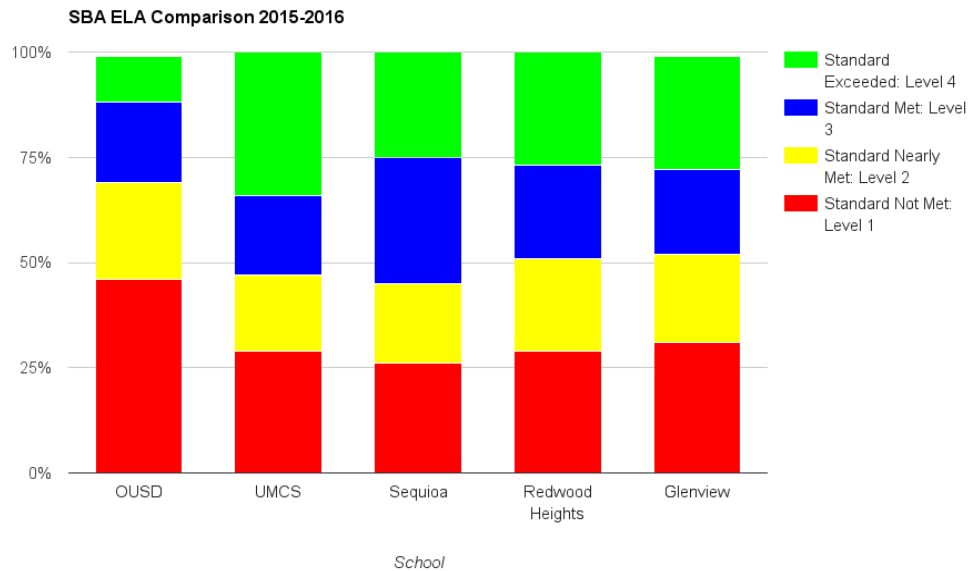
- 25th out of 120 schools in terms of overall performance
- 8th out of 120 school in terms of two year growth

In Math, Urban Montessori ranked:

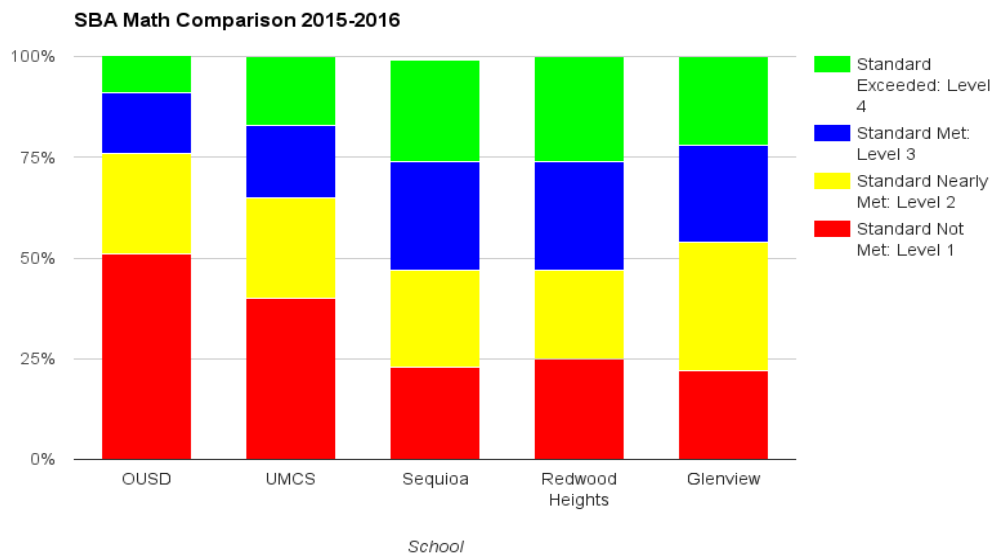
- 30th out of 120 schools in terms of overall performance
- 9th out of 120 school in terms of two year growth

While the overall ranking and the growth ranking are both strong indicators of success, Urban Montessori also seeks to measure itself against the highest performing schools in the district serving similar student populations. Toward this end, it has selected three comparison schools that closely match Urban Montessori when looking at race and socioeconomic factors and are reaching high levels of achievement.

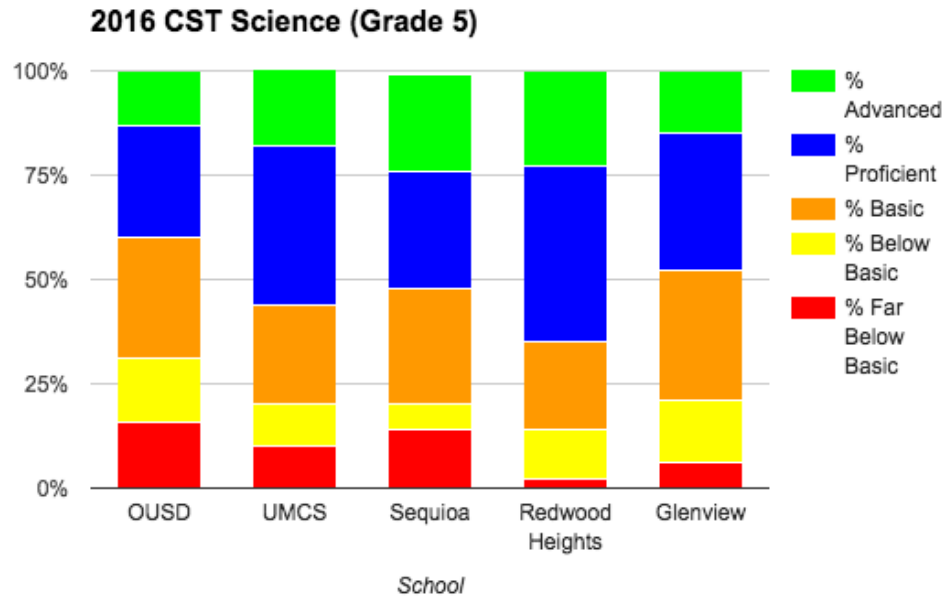
In English-Language Arts, more than 50% of Urban Montessori students either met or exceeded the standard for proficiency. This significantly outpaced proficiency levels achieved within OUSD as a whole and was on par with the comparison schools.



In Math, more than 35% of our students either met or exceeded the standard for proficiency. This significantly outpaced proficiency levels achieved within OUSD as a whole, but lagged behind the comparison schools.



For the 2015-16 California Standards Test (CST) in Science, Urban Montessori 5th grade performance is comparable to the district as a whole as well as comparison schools that were identified.



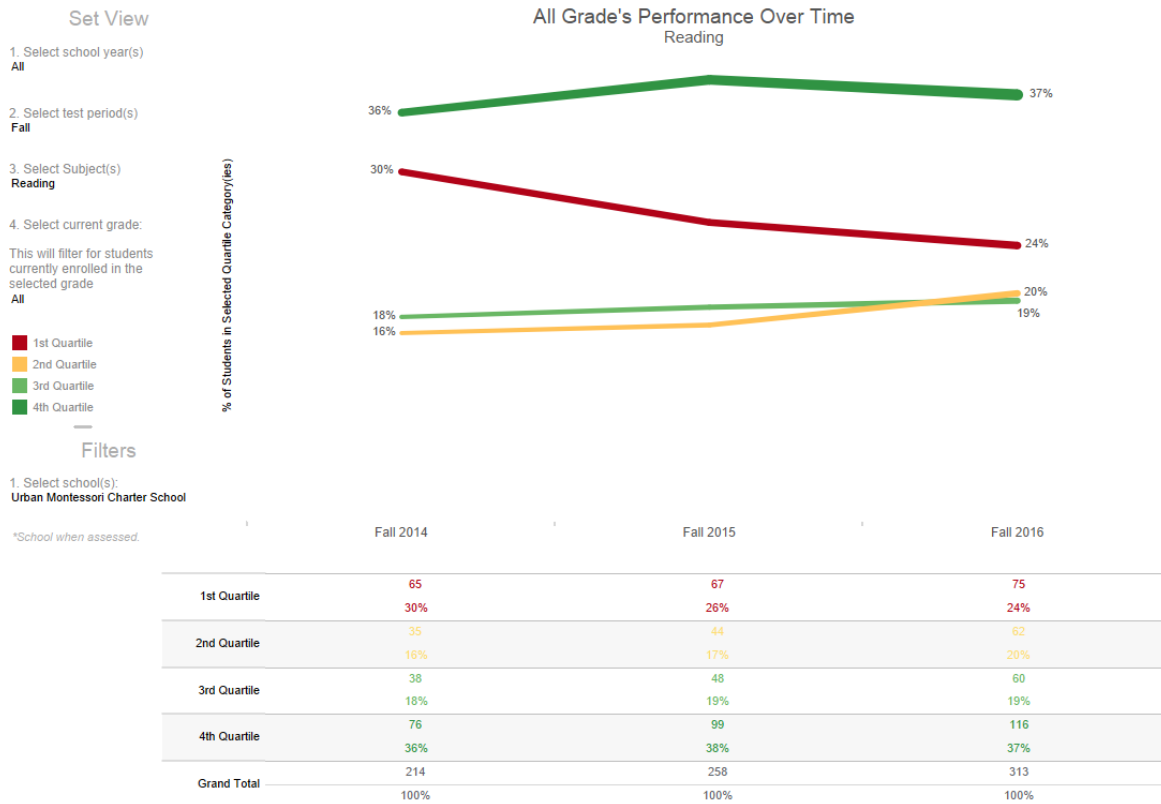
NWEA MAP

Urban Montessori is in its third year of using NWEA as an internal assessment for Math, Reading, and Language Usage. Using the same assessment over time has allowed us to have an ongoing picture of student progress over time, especially for students who have been with us since 2014.

In all three subject areas - Reading (grade 1 and up), Math (grade 1 and up) and Language Usage (grade 3 and up only) - we have consistently made progress by reducing the overall percentage of students that are performing in the lowest performing quartile (red line). This has been realized while also concurrently increasing overall enrollment by approximately 60 students per year who come from a variety of academic settings.

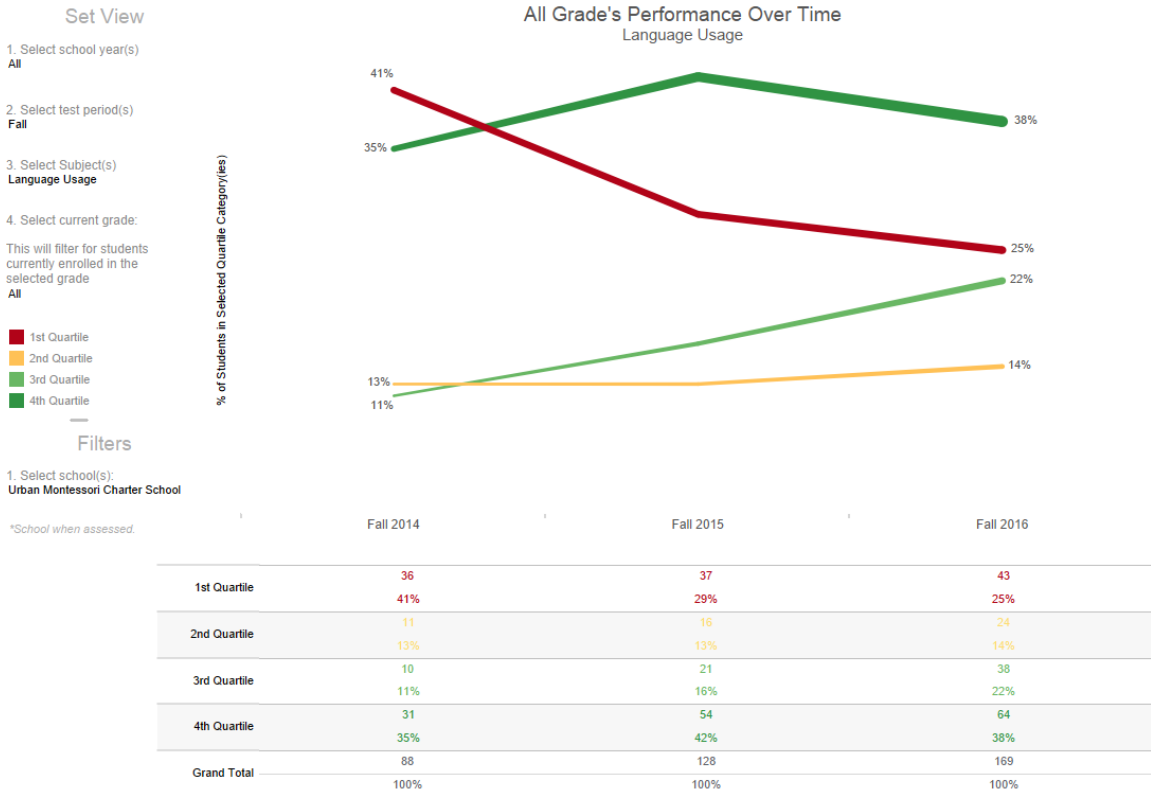
**Reading**

- Fall 2014 lowest performing quartile (red line) was 30%
- Fall 2015 lowest performing quartile was 26%
- Fall 2016 lowest performing quartile was 24%



*Language Usage (grade 3 and up only)*

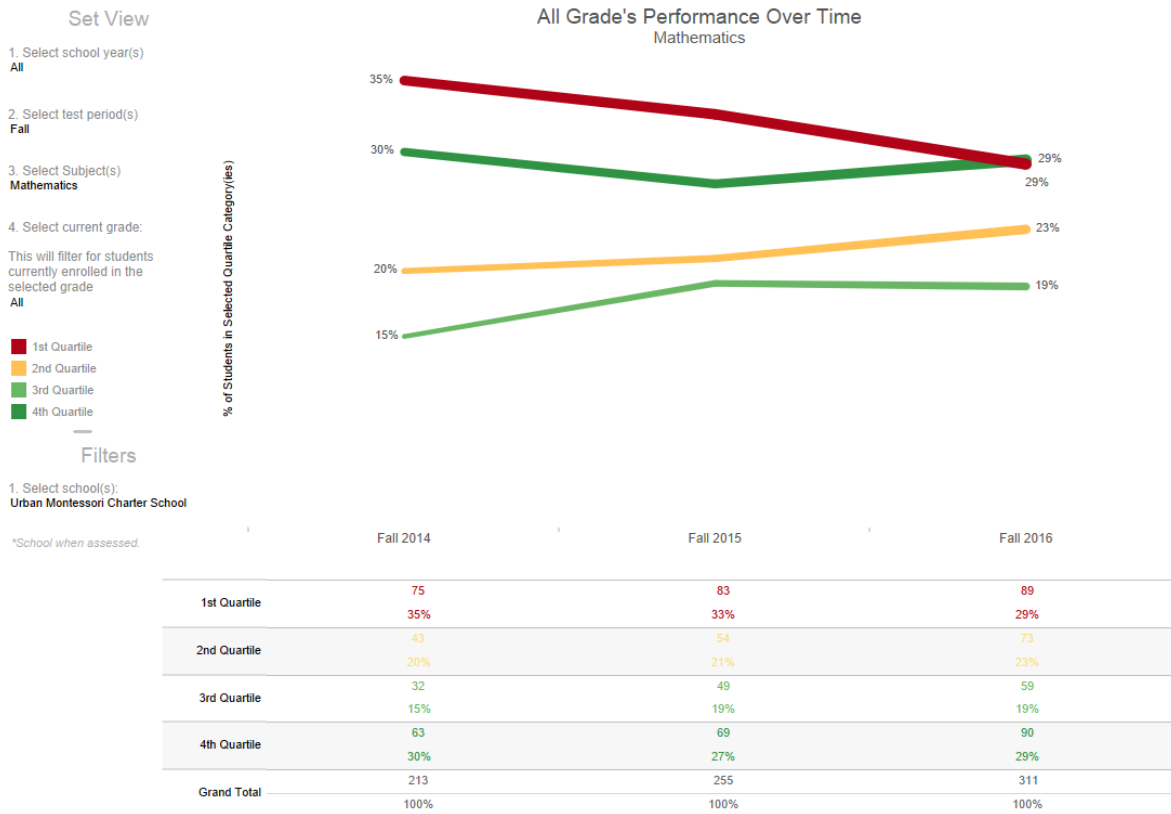
- Fall 2014 lowest performing quartile (red line) was 41%
- Fall 2015 lowest performing quartile was 29%
- Fall 2016 lowest performing quartile was 25%





**Mathematics**

- Fall 2014 lowest performing quartile (red line) was 35%
- Fall 2015 lowest performing quartile was 33%
- Fall 2016 lowest performing quartile was 29%



**Attendance Rate**

The strong attendance rate at Urban Montessori provides the foundation for the gains detailed above - students can't learn if they aren't in school. In addition, the high attendance rate is a critical indicator of school culture and climate. Students want to be at Urban Montessori, and as a result are there on a regular basis and at a rate significantly higher than the district and state averages.

Attendance Rate				
	2012-13	2013-14	2014-15	2015-16
Urban Montessori Attendance Rate	94.16%	94.18%	94.48%	93.49%
OUSD Attendance Rate	74.24%	74.12%	73.33%	TBD

CA Attendance Rate	88.34%	88.21%	87.71%	TBD
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Source: OUSD and State data from [www.ed-data.org](http://www.ed-data.org), Urban Montessori data from P-2 Attendance Reports

Stakeholder Surveys

A critical indicator in measuring Urban Montessori’s success to date is in how well it serves its different stakeholders. Urban Montessori conducts an annual survey with both families and staff to assess strengths and identify areas of growth. Key indicators of the strength of the Urban Montessori program are as follows:

- 90% of families feel welcome and appreciated
- 94% of families feel Urban Montessori teachers create a healthy school environment where all children can learn
- 100% of lead teachers returned for the 2016-17 school year, with the majority reporting they can see themselves staying indefinitely

**Sound Governance and Finance**

Urban Montessori has established itself as a fiscally and organizationally sound institution. This includes strong fiscal accountability, responsible governance, and dedicated leadership.

Strong Fiscal Accountability

Urban Montessori has strong fiscal health, as is evidenced by the following:

- **Positive Cash Balance** - Positive cash balances have been maintained during the term of the current charter. Future cash flow is projected to remain positive through the next charter term.
- **Financial Reserve** - Urban Montessori has built a healthy financial reserve over the past charter term. Urban Montessori is projecting that the financial reserve will grow to 31% by the end of 2019-20.
- **Facility Grant** - Urban Montessori was awarded a Facility Grant in the amount of \$951,000 from the State Charter School Facilities Incentive grant program.
- **Clean Audits** - Clean audits have been maintained with no findings relative to weak internal controls, potential mismanagement, or any other area of concern. The exception is the 2014-15 school year, in which two findings were made related to the number of school days and the unduplicated count. These findings were both corrected and are noted in the 2015-16 audit.
- **Strong Attendance and Enrollment** - Urban Montessori maintains a strong attendance rate and continues to grow enrollment.

Responsible Governance

The Urban Montessori Board of Directors has a demonstrated capacity to maintain the fiscal and organizational strength of Urban Montessori Charter School. The Board consists of members with the following experiences: charter school start-up, finance, and operations, Montessori expertise, K-12 instruction, administration, curriculum design and development, special education, school leadership, teacher development, educational technology, child psychology, innovative school design, new school development, educational research and evaluation, arts integration, fundraising, real estate, business planning, public relations, and marketing. Board Members, along with their professional experience, role on the Board, and term expiration are detailed in **Figure ES-2**. A Matrix of Expertise is provided in **Figure ES-3**.

- Please see Appendix D-3 for Biographies of the Board of Directors

**Figure ES-2 Board of Directors**

Name and Title	Board Position	Term Expiration
Nancy McAfee Flemming, Physician	Member, Academic Oversight Committee Chair	August 2018
Michelle Hammons, Head of School	Member, Academic Oversight Member	February 2017
Greg Klein, Senior Director	Chairperson	June 2017
Jully Lau, Manager	Member	May 2017
Hae-Sin Thomas, CEO	Treasurer and Finance Committee Chair	August 2018
Jeremy Rothenberg, Healer and Teacher	Secretary	May 2018
Daniel Bissonnette, Montessori Lead Teacher	Member, Academic Oversight Committee Secretary	June 2018
Amy Rodriguez Bolar, Senior Director of Development	Member, Finance Committee Member	June 2018
Copely Kelly, Attorney	Vice-Chairperson, Academic Oversight Committee Member	June 2018
Christina Stearns, Senior Research Associate	Member, Academic Oversight Committee Member	August 2018
Joanna Locke, Physician	Member, Finance Committee Secretary	August 2018

**Figure ES-3 Matrix of Expertise**

Member	Educational Program	Finance	Human Resources	Governance	Fundraising	Community Outreach and Advocacy	School Administration and Operations	Technology and Innovation
Nancy McAfee Flemming	X					X		
Michelle Hammons	X			X			X	
Greg Klein	X			X	X		X	X
Jully Lau		X				X		X
Hae-Sin Thomas	X	X	X	X	X	X	X	
Jeremy Rothenberg	X					X		
Daniel Bissonnette	X						X	X
Amy Rodriguez Bolar		X			X			
Copely Kelly			X	X			X	
Christina Stearns					X		X	
Joanna Locke	X	X				X		

Strong Leadership

The Urban Montessori Senior Leadership Team brings a depth of experience in support of the school across the sectors of educational program, data and assessment, student services, finance, development and fundraising. Together, these members have a proven track record of operating Urban Montessori in support of its students.

Senior Leadership Team members include:

- David Castillo, Head of School
- Michael Stollman, Director of Instruction - Primary/Lower Elementary
- Jen Heeter, Director of Instruction - Upper Elementary
- Kelley Gardner, Director of Special Education Programs
- Taima Beyah, Director of Operations

Community Partners

Urban Montessori Charter School is also thrilled to have several strong collaborative relationships that enable our schools to leverage the many assets in the Bay Area and to share our best practices with the larger education community. The school works with the Arts Learning leadership at the Alameda County Office of Education to build capacity of our teachers around arts integration. In addition, the School works with St. Mary’s College’s Montessori Teacher Education Program and The Montessori Teacher Education Center San Francisco Bay Area (MTEC/SFBA) to ensure there is a strong pipeline of Montessori-trained, California state-credentialed teachers at the School and to recruit more Montessori-trained teachers to public education. We also work closely with the Reach Institute for School Leadership and the Bay Area Teacher Training Institute (BATTI). Finally, we work very closely

with the Design School at Stanford University collaborate with the school in developing the design thinking curriculum.

## **THE CONTINUED NEED FOR URBAN MONTESSORI**

### ***Why a Public Montessori?***

Montessori has become an educational option primarily for those who can afford private education. Because the Montessori method utilizes individualized learning plans designed to take each child with his or her unique gifts and challenges to success and independence, Urban Montessori believes it to be the ideal model and approach for children living in diverse and urban settings.<sup>5</sup> Dr. Montessori designed her approach based on observations and research in schools serving high-poverty communities. In alignment with her research, she developed an approach, a set of aligned materials and teacher training that provide children opportunities to learn using multiple modalities driven by their own curiosity. Urban Montessori Charter School believes that the Montessori model is a powerful model for 21<sup>st</sup> century learning and that it should be a public school option for all families and their children.

### **The Impact**

When Urban Montessori Charter School (UMCS) opened in the fall of 2012, we became Oakland's first public Montessori school, introducing a powerful, 21st century-aligned model, committed to becoming a truly innovative and unique Transitional Kindergarten to 8th grade school option for Oakland (and neighboring cities') families.

The Montessori model was designed in alignment with children's developmental stages, anticipating the era of education based in neuroscience and the pursuit of personalized learning models by over 100 years.

UMCS takes Montessori into the 21st century with a school model that rests on three foundational pillars:

- Montessori Curriculum and Pedagogy
- Design Thinking Process
- Arts Integration

Today, UMCS serves 370 students in grades TK-to-6 and regularly maintains a waitlist of nearly 100 children throughout the year. Last year, we received over 300 applications for a mere 90 openings. At full size, UMCS will serve a TK-to-8 student body that reflects the socioeconomic and racial diversity of Oakland. The large number of applicants and the size of our waitlist both highlight the enormous demand for our model and support our original vision to scale by opening other Urban Montessori school sites in the Bay Area and around the nation.

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<sup>5</sup> Lillard, A, Else-Quest, N (2006). "Evaluating Montessori Education: *Science*: 1893-1894.

## Intent of the Charter Schools Act

The Charter Schools Act of 1992 states that:

*It is the intent of the Legislature...to provide opportunities for teachers, parents, pupils, and community members to establish and maintain schools that operate independently from the existing school district structure, as a method to accomplish all of the following:*

- a. *Improve pupil learning.*
- b. *Increase learning opportunities for all pupils, with special emphasis on expanded learning experiences for pupils who are identified as academically low achieving.*
- c. *Encourage the use of different and innovative teaching methods.*
- d. *Create new professional opportunities for teachers, including the opportunity to be responsible for the learning program at the school site.*
- e. *Provide parents and pupils with expanded choices in the types of educational opportunities that are available within the public school system.*
- f. *Hold the schools established under this part accountable for meeting measurable pupil outcomes, and provide the schools with a method to change from rule-based to performance-based accountability systems.*
- g. *Provide vigorous competition within the public school system to stimulate continual improvements in all public schools.*

- California Education Code Section 47601

Urban Montessori Charter School fully embraces the Legislative Intent of the Charter Schools Act and its mandate. It is the School's mission to ensure all children graduating from Urban Montessori Charter School are prepared to be successful academically, socially, and emotionally at any high school of their choice, and the School monitors its own efforts towards this commitment by developing and implementing a comprehensive student growth and monitoring system in alignment with a performance-based assessment system that creates school-wide accountability for every child's performance (Education Code 47601(a) and (f)). The Montessori model thoughtfully combined with arts integration, design thinking, and a comprehensive student growth monitoring and intervention system (Response to Intervention) provides the scaffolding, differentiation, acceleration, and monitoring that low-achieving children may require (Education Code 47601(b)) and a unique public school option generally only available to those who can afford private school (Education Code 47601(e)). The founding team is particularly invested in creating both a replicable model and a demonstration site for teacher learning, where teachers can become masters of blending the Montessori model with arts integration and design thinking and create a truly innovative approach that they can share as teacher leaders across Alameda County Office of Education (Education Code 47601(d)).

The Charter Schools Act of 1992 provides that a petition must contain reasonably comprehensive descriptions of the elements described in California Education Code Section 47605-~~6~~(bc)(5)(A)-(QQ). These subsections of law and the required descriptions are discussed below. This document is presented in the order and format suggested by the State Board of Education's recommended "Model Application."

## OVERVIEW OF CHANGES

To facilitate the review of this renewal charter petition by the Alameda County Office of Education, Urban Montessori has provided an overview of key changes by section in **Figure ES-4**. Changes to

the authorized charter were made in support of three objectives:

- Provide additional detail on the instructional approach, curriculum, materials, and assessment across all subject areas as the K through 8th grade model has evolved over the course of the first charter term.
- Update the charter to reflect the current operations and governance structures of the school.
- Update the charter to meet legal requirements that have gone into effect since the original authorization.

**Figure ES-4 Overview of Changes**

Section	Summary Description
All	<ul style="list-style-type: none"> <li>● Updated tense from future to present</li> <li>● Updated Education Code references</li> <li>● Updated references to state standards to include Common Core State Standards (CCSS) in ELA and Math, Next Generation Science Standards (NGSS), and California State Standards (CST) in History/Social Studies and other subject areas.</li> <li>● Resequenced sections to follow the order presented in California Education Code 47605.6 and in the ACOE Charter Petition Review Matrix (i.e. A - O)</li> <li>● Added Transitional Kindergarten to grade span, to serve TK through 8th.</li> </ul>
Introduction and Executive Summary	
Introduction	<ul style="list-style-type: none"> <li>● Updated introduction, including partnership with ACOE, continued need for Urban Montessori in ACOE, and highlights of the model</li> </ul>
Strong Student Outcomes	<ul style="list-style-type: none"> <li>● Added evidence of a strong educational model, which meets the criteria for renewal through strong student outcomes</li> </ul>
Sound Governance and Finance	<ul style="list-style-type: none"> <li>● Added evidence of financial soundness</li> <li>● Updated Board of Directors Members, Offices, and Terms</li> <li>● Provided Board of Directors Matrix of Expertise</li> <li>● Updated School Leadership Job Titles and Composition</li> </ul>
Comprehensive Plans for Next Charter Term	<ul style="list-style-type: none"> <li>● Added list of evidence provided within plan for next charter term</li> </ul>
Table of Changes	<ul style="list-style-type: none"> <li>● Added Table of Changes to facilitate review</li> </ul>
Element A - Educational Program	
Students to Be Served	<ul style="list-style-type: none"> <li>● Updated enrollment plan for next charter term, including the addition of TK.</li> <li>● Updated student demographic data, as well as comparison to district, county, and state</li> </ul>

<p>Attendance Requirements</p>	<ul style="list-style-type: none"> <li>● Added section on instructional minutes, school day, and school year</li> </ul>
<p>What It Means to Be Educated in the 21st Century</p>	<ul style="list-style-type: none"> <li>● Updated qualities to align with the CCSS, NGSS, and CSS.</li> </ul>
<p>Educational Philosophy</p>	<ul style="list-style-type: none"> <li>● Added a statement of the Urban Montessori educational philosophy, preceding the description on how learning best occurs.</li> </ul>
<p>How Learning Best Occurs</p>	<ul style="list-style-type: none"> <li>● Updated slightly to provide additional clarity.</li> </ul>
<p>Curriculum and Instruction</p>	<p>Overall</p> <ul style="list-style-type: none"> <li>● Updated to reflect TK through 8th grade program</li> <li>● Updated to align with the CCSS, NGSS, and CSS</li> </ul> <p>Overview</p> <ul style="list-style-type: none"> <li>● Added section on “Integrating Reader’s and Writer’s Workshop into Montessori”</li> <li>● Added section on “Integrating Social and Emotional Learning into Montessori”</li> <li>● Updated section on “Integrating Design Thinking into Montessori” to reflect evolution of the program and of design thinking in general</li> </ul> <p>Primary</p> <ul style="list-style-type: none"> <li>● Added core content areas of Design Thinking, Character Education and Peace, and Physical Education and Health</li> <li>● Updated list for “Instructional Strategies &amp; Materials” for math, language arts, and cultural studies and science</li> </ul> <p>Elementary</p> <ul style="list-style-type: none"> <li>● Removed core content area of World Languages</li> <li>● Updated Writing Curriculum to utilize Teacher’s College Writer’s Workshop</li> <li>● Updated Handwriting curriculum from D’Nealian to Handwriting Without Tears</li> <li>● Updated goals in mathematics to align with CCSS in math</li> </ul> <p>Secondary</p> <ul style="list-style-type: none"> <li>● Adjusted World Languages, introduced in 7th and 8th grade with a focus on Spanish</li> <li>● Updated Practical Life</li> </ul>
<p>Plan for Meeting the Needs of Special Populations</p>	<ul style="list-style-type: none"> <li>● Added information on the Response to Intervention (RTI) model</li> <li>● Updated and added detail on services for students who are English Learners (ELs), including new text on identification and reclassification, updated assessments (transition from CELDT to ELPAC), strategies to serve ELs through integrated and designated ELD, qualifications for teachers, monitoring program effectiveness, and an implementation plan for new California ELD standards over the term of the charter</li> </ul>



	<ul style="list-style-type: none"> <li>● Updated sections on students who are low achieving and high achieving to fall under the Response to Intervention program for identification of needs and provision of services</li> <li>● Updated section on serving students with identified special needs to reflect current legal requirements and best practice</li> <li>● Added assurance on 504 Plan compliance</li> </ul>
Element B - Measurable Student Outcomes	
Methods for Measuring Student Progress Toward Outcomes	<ul style="list-style-type: none"> <li>● Added assurances for alignment to Local Control and Accountability Plan (LCAP)</li> <li>● Replaced previous Measurable Pupil Outcomes with new Goals, Actions, and Measures aligned to the eight State Priorities and the school LCAP</li> </ul>
Element C - Methods of Assessment	
Forms of Assessment	<ul style="list-style-type: none"> <li>● Updated external assessments to reflect current measures under the California Assessment of Student Performance and Progress (CAASPP), including assurance to continue to modify to reflect changes made by the CDE</li> <li>● Updated internal assessments to reflect current measures aligned to the Common Core, including addition of NWEA to replace mClass, SRI, and Albanesi assessments</li> <li>● Removed “Annual Goal” from Assessment Continuum Table, as those are now included in Element B</li> <li>● Added/fleshed out a section on the Types of Assessments, reflecting the shift to CAASPP</li> <li>● Added/fleshed out a section on the Uses of Data, including formal reporting to caretakers and development of the LCAP and SARC</li> </ul>
Element D - Governance	
Introduction	<ul style="list-style-type: none"> <li>● Added overview of bodies involved in governance, reporting structure, and reference to Organizational Charter in Appendix</li> </ul>
Board of Directors	<ul style="list-style-type: none"> <li>● Added detail on number of Board Members and term</li> <li>● Updated text to reflect compliance with Brown Act and Conflict of Interest, as well as alignment with current ACE bylaws</li> <li>● Added oversight and approval of LCAP</li> </ul>
Executive Director	<ul style="list-style-type: none"> <li>● Added oversight of LCAP</li> </ul>
Family Involvement	<ul style="list-style-type: none"> <li>● Added detail on Family Involvement, including participation on Family Advisory Council (FAC), School Site Council (SSC), and English Learner Advisory Committee (ELAC)</li> <li>● Added participation in development of LCAP and SPSA</li> </ul>

Element E - Human Resources	
Employment Qualifications	<ul style="list-style-type: none"> <li>● Updated positions, along with roles, responsibilities, and qualifications</li> <li>● Removed requirements from No Child Left Behind (NCLB) that are no longer in effect</li> <li>● Added section on evaluation</li> <li>● Moved information as follows: health and Safety to Element F, Staff Retirement Systems to Element K, Employee Rights to Element M, and Employee Representation to Assurances.</li> <li>● Added assurances on contracted service providers</li> </ul>
Element F - Health and Safety	
Health and Safety of Pupils and Staff	<ul style="list-style-type: none"> <li>● Added introductory text with assurances</li> <li>● Added text on emergency epinephrine auto-injectors</li> <li>● Expanded section on Sexual Harassment to include Anti-Discrimination, including an updated list of protected classes</li> <li>● Added references to Emergency Plan, Health and Safety Policy, and Anti-Discrimination and Sexual Harassment Policy in Appendix</li> </ul>
Element G - Racial and Ethnic Balance	
Recruitment Strategy	<ul style="list-style-type: none"> <li>● Updated recruitment strategy to include participation in Enroll Oakland Charters</li> <li>● Updated languages for distribution of enrollment materials</li> </ul>
Element H - Admissions Requirements	
Admissions	<ul style="list-style-type: none"> <li>● Updated application and enrollment process to reflect participation in Enroll Oakland Charters</li> <li>● Added assurances</li> <li>● Updated grades served</li> <li>● Added admissions and enrollment timeline</li> </ul>
Lottery	<ul style="list-style-type: none"> <li>● Removed conditions for period of PCSGP grant</li> <li>● Shifted preferences to exemptions, then included weighted lottery for preferences in the case of a lottery</li> <li>● Added details on process for lottery and wait list</li> <li>● Added additional assurances, in keeping with legal requirements</li> </ul>
Orientation	<ul style="list-style-type: none"> <li>● Updated orientation process</li> </ul>
Element I - Financial Audit	
Financial Audit	<ul style="list-style-type: none"> <li>● No changes of substance</li> </ul>
Element J - Pupil Suspension and Expulsion	

Suspension and Expulsion	<ul style="list-style-type: none"> <li>● Updated policies in alignment with current education code and law, including ensuring willful defiance is not an expellable offense and adding definitions for bullying and an electronic act</li> <li>● Addition of homework policy for students suspended for five days or less</li> <li>● Minor adjustments in wording to match current education code and law</li> </ul>
Element K - Employee Retirement Systems	
Retirement	<ul style="list-style-type: none"> <li>● No changes</li> </ul>
Element L - Attendance Alternatives	
Attendance Alternatives	<ul style="list-style-type: none"> <li>● No changes of substance</li> </ul>
Element M - Employee Return Rights	
Employee Return Rights	<ul style="list-style-type: none"> <li>● Updated text to reflect county authorization</li> <li>● Added text to reflect that ACOE bargaining contracts will govern in cases where ACOE employees leave ACOE to work at Urban Montessori and then wish to return to ACOE</li> </ul>
Element N - Dispute Resolution Process	
Dispute Resolution Process	<ul style="list-style-type: none"> <li>● Added introduction on intent</li> <li>● Updated text on Internal Disputes to utilize Uniform Complaint Policy</li> <li>● Added Uniform Complaint Policy to Appendix</li> <li>● Added allotment for “Respective Designees”</li> <li>● Added text on internal disputes and use of Uniform Complaint Procedures</li> </ul>
Element O - School Closure Procedures	
School Closure Procedures	<ul style="list-style-type: none"> <li>● Minor changes to individual words in text to reflect recommended text and best practice</li> </ul>
Miscellaneous Charter Elements	
Financial Plan	<ul style="list-style-type: none"> <li>● Provided updated Budget Narrative and Assumptions, Budget, and Cash Flow</li> </ul>
Administrative Services	<ul style="list-style-type: none"> <li>● No changes</li> </ul>
Facilities	<ul style="list-style-type: none"> <li>● Provided updated facility assumptions and lease agreement.</li> </ul>
Impact on the Charter Authorizer	<ul style="list-style-type: none"> <li>● No changes</li> </ul>
Transportation	<ul style="list-style-type: none"> <li>● Added assurance on transportation</li> </ul>

Conclusion	<ul style="list-style-type: none"> <li>• Added conclusion to reflect length of next charter term</li> </ul>
Appendices	
Appendix	<ul style="list-style-type: none"> <li>•</li> </ul>
Appendix Misc-1	<ul style="list-style-type: none"> <li>• Provided updated Budget Narrative and Assumptions, Budget, and Cash Flow for five-year term.</li> </ul>

## ELEMENT A: EDUCATIONAL PROGRAM

### Governing Law:

The educational program of the charter school, designed, among other things, to identify those whom the charter school is attempting to educate, what it means to be an “educated person” in the 21<sup>st</sup> century, and how learning best occurs. The goals identified in that program shall include the objective of enabling pupils to become self-motivated, competent, and lifelong learners.

- California Education Code Section 47605-6(~~bc~~)(5)(A)(i)

The annual goals for the charter school for all pupils and for each subgroup of pupils identified pursuant to Section 52052, to be achieved in the state priorities, as described in subdivision (d) of Section 52060, that apply for the grade levels served, ~~or the nature of the program operated, by the charter school,~~ and specific annual actions to achieve those goals. A charter petition may identify additional school priorities, the goals for the school priorities, and the specific annual actions to achieve those goals.

- California Education Code Section 47605-6(~~bc~~)(5)(A)(ii)

### MISSION OF URBAN MONTESSORI CHARTER SCHOOL

Urban Montessori Charter School develops self-directed and engaged learners who are academically, socially and emotionally prepared to succeed in any high school. Nurturing the innovators of tomorrow to creatively meet the challenges of today’s world with confidence, compassion and grace, Urban Montessori cultivates individual curiosities and strengths, while holding children to a high standard of excellence. At Urban Montessori children deepen their understanding of what it means to live responsibly in a diverse urban community.

### TARGET POPULATION – WHOM THE SCHOOL IS ATTEMPTING TO EDUCATE

#### Age, Grade, and Student Enrollment

Urban Montessori Charter School will serve approximately 456 TK-8 children when it reaches capacity during the 2018-2019 school year, the School’s seventh year of operation. Urban Montessori structures its classes in alignment with Maria Montessori’s planes of development, with 4-6 year olds in “primary” classrooms, 6-9 year olds in multi-age “lower elementary” classrooms, 9-12 year olds in multi-age “upper elementary” classrooms, and 12-14 year olds in a multi-age “middle school adolescent” program. The Urban Montessori team will explore the development of a pre-Kindergarten program with ambition to eventually offer the full Montessori multi-age Primary program (3-6 year olds). In the interim, the School will continue to use the Transitional Kindergarten and Kindergarten years to acclimate children into the Montessori environment, given that many children come to the School without Primary Montessori experience. Every year, the School recruits for the Primary program, bringing in approximately 12 Transitional Kindergarteners and 48 Kindergarteners annually. Because the School has a high retention rate at the Transitional Kindergarten level, the Primary program is strengthened by TK students who enter Kindergarten having already completed one year of Montessori education at the School. Urban Montessori’s multi-age classrooms have approximately 33 children each. A lead teacher and a support teacher are assigned to every classroom. **Figure A.1** details the enrollment plan during the next charter term.

#### Figure A.1 2017-2022 Enrollment Plan

School Year	Grade Levels Served	Enrollment <sup>6</sup>
2017-2018	TK-7	408
2018-2019	TK-8	441
2019-2020	TK-8	456
2020-2021	TK-8	456
2021-2022	TK-8	456

**Desired Student Population**

Within the boundaries of Oakland, Urban Montessori Charter School is the only Montessori public school. As such, the School remains deeply committed to being an option to as many families across Oakland as possible.

Urban Montessori aims to enroll children whose diversity is representative of Oakland’s population. According to the 2010 US Census, the city is 27.3% Black or African American, 25.9% White (non-Hispanic), and 16.7% Asian. Hispanics or Latinos (of any race) make up 25.4% of the total population. The data show that Oakland is one of the most ethnically diverse cities in the country. There have been numerous studies demonstrating that children who attend schools with children and families from different backgrounds, cultures, races, and religions, from alternative family structures, and who speak different languages are better prepared to successfully negotiate today’s increasingly global society academically, economically, and socially<sup>7</sup>. Urban Montessori believes that diversity in a student population is an asset, one that powerfully and authentically engages children in productive discourse around what makes us different and what brings us together and exposes them to the many perspectives, values, traditions, and ideas in our multicultural community. The demographics for the student population at Urban Montessori, as well as for Oakland Unified School District (OUSD), Alameda County, and the State of California are detailed in **Figure A.2**.

**Figure A.2 2014-15 Student Demographics**

2014-15 Demographics				
Students who are:	Urban Montessori Charter School	Oakland Unified School District	Alameda County Public Schools	California Public Schools
White	33.7%	9.8%	20.2%	24.6%
Latino	25.1%	33.8%	33.6%	53.6%
African-American	19.4%	26.7%	11.6%	6.0%
English Language Learners	19.7%	32.3%	21.9%	22.3%

<sup>6</sup> Grade size is expected to decrease through attrition.

<sup>7</sup> Crain, R. & Mahard, R. (1978): School racial composition and black college attendance and achievement test performance. *Sociology of Education*, 81-101; Boozer, Krueger, and Wolkon(1992). Race and School Quality Since Brown vs. Board of Education. *Brookings Papers on Economic Activity: Microeconomic*, 269-326.

Reclassified English Proficient (R-FEP)	7.1%	4.2%	10.9%	11.0%
Socio-economically Disadvantaged	36.2%	74.5%	43.9%	58.6%
Identified as Having Special Needs (IEP)	11%	11.3%	10.6%	11.5%

Sources: For public school enrollment, [www.ed-data.org](http://www.ed-data.org) and [www.kids-data.org](http://www.kids-data.org). For Oakland youth age 0-20, Oakland Fund for Children and Youth Demographic Report <http://www.ofcy.org/assets/Agendas/2015-Agendas/OFCY-Demographic-Report-3.25.15-FINAL-to-OFCY.pdf>

The Montessori model is the ideal model to serve such a diverse population of children. At its core, the Montessori approach is individualized and differentiated to ensure all children receive an educational program and an educational experience that builds upon their strengths and addresses their areas of growth, that takes them from where they are and accelerates their learning so they get where they need to be. The Montessori materials and the Montessori prepared environment provide visual, auditory, kinesthetic, and tactile learning experiences, tapping children’s multiple modalities to both present information and assess their understanding. The multi-age classroom allows children to progress at a natural pace and provides both the student who is academically under-performing and the student who is academically high-performing opportunities to learn in their zones of proximal development. Using a more traditional model to serve the needs of Special Education children, English language learners, gifted children, children academically behind, and children whose backgrounds, learning styles and interests vary widely can be challenging, but this diversity is not a challenge in a Montessori classroom, This diversity is an asset that the Montessori teacher uses to enhance the learning of all children in the class.

As required by law, the School will conduct outreach to attract a student body reflective of Oakland’s general population. This will include extensive outreach to preschool programs both public and private, parent groups, churches, neighborhood groups, community organizations, and youth service organizations. All materials will be translated into multiple languages, and materials will be posted at various community public spaces. The School is also a participant in the new Enroll Oakland Charters application system.

- [Please see Appendix A-1 for the Urban Montessori Outreach Plan](#)

**ATTENDANCE**

**School Year**

Urban Montessori’s proposed academic calendar is in compliance with the minimum number of annual instructional minutes outlined in Education Code 47612.5. This requires, at a minimum, the following number of minutes of instruction:

1. For students in Transitional Kindergarten/Kindergarten: 36,000 instructional minutes.
2. For students in 1st, 2nd, and 3rd Grade: 50,400 minutes.
3. For students in 4th to 8th Grade: 54,000 minutes.

The Urban Montessori school year calendar will include 180 instructional days, which Urban Montessori intends to adhere to as state and federal funding allows. Urban Montessori retains the right to modify its annual calendar to coordinate with the calendar of the district and the calendars of professional development partners and such modification shall not be considered a material revision of the charter.

- [Please see Appendix A-2 for the Urban Montessori School Year Calendar](#)

### **School Day**

The instructional day at Urban Montessori will run from 8:15 am to 3:00 pm Monday, Tuesday, Thursday, and Friday and 8:15 to 12:30 on Wednesday. Instruction will take place across the following subjects: Language Arts, Mathematics & Geometry, History/Social Science, Cultural Studies and Science, the Arts (Visual Arts, Music, Drama, Movement), Character and Peace Education,, Health and Physical Education, Practical Life, Design Thinking, and Technology.

- [Please see Appendix A-3 for the Urban Montessori Master Schedule](#)

### **WHAT IT MEANS TO BE AN EDUCATED PERSON IN THE 21<sup>ST</sup> CENTURY**

Urban Montessori believes there are three central attributes that describe an educated person in the 21st Century, particularly when technological advances have provided the world's citizens with the simultaneous ability to easily engage and disengage with each other more than ever before. An educated person in the 21st century is:

- A self-directed learner
- Emotionally intelligent
- Creatively confident

Before detailing each of these attributes, it bears stating that unequivocally and above all else, Urban Montessori children will achieve academically at high levels and be expected to meet or exceed the standards adopted by the state of California, including the Common Core State Standards (CCSS) for Math and ELA, Next Generation Science Standards (NGSS), and California State Standards (CSS). As increasing numbers of children around the globe are finding themselves able to excel on the international stage, and they are raising the bar and re-defining what we can expect of future generations, Urban Montessori's children must as well. They will work hard, be held to very high standards and perform on a wide range of assessments, regardless of format or purpose.

#### **The Self-Directed Learner**

Self-directed learners are children and citizens of their community, country and world who are intrinsically motivated to understand the world around them. They are capable of forming their own questions and are adept at assessing the broad range of available resources to uncover answers. Their ability to think flexibly means there is no challenge they cannot dissect, no data out of their grasp and no results they cannot effectively share with others.

Urban Montessori children are:

- High performers, driven to succeed through their love of learning;
- Natural innovators, empowered to seek and find answers to their own questions; and
- Capable communicators, excited by and effective in their presentation of knowledge.

#### **Emotional Intelligence**

The importance of self-direction, however, is not an endorsement of individual learning in a vacuum. The opportunities and challenges that the 21st century presents to its children demand a very well developed ability to collaborate with others – and not just others who may live on the same street. Today, children on their way to becoming valuable members of our local and global societies must be



capable of respectfully interacting and engaging with the most diverse cohorts, and in every conceivable category, from geography to religion to politics.

Urban Montessori children are:

- Model collaborators, equally able to deliver results on their own and as part of a team;
- Representative and respectful of the diversity of ideas that drives the betterment of all societies.

### Creative Confidence

The previous attributes combine to create individuals who are poised to recognize the supremely interconnected nature of all things in the 21st century. Having creative confidence means children have a process to tackle challenges they are confronted with in and out of school. They know that defining the right problem to work on is as important as solving it and that mindfully collaborating with team members with different skills and interests will yield better results. They flexibly use the tools and techniques of innovators, are optimistic that change is possible and believe that they can be part of that change.

Urban Montessori children are:

- Expert problem-solvers who routinely make unexpected connections across all aspects of their learning;
- Active community members who constantly work for change; and
- Ethical advocates who turn creative insight into creative action.

### EDUCATIONAL PHILOSOPHY

Urban Montessori believes that children learn best when they are engaged in interesting work at their level; when the child's imagination and curiosity are activated; and when they have the time, space and guidance to go deep into an area of interest. The Montessori Cultural Areas (History, Geography and Science) form the core of the curriculum and act as jumping off points into areas of deeper exploration. Children are supported to develop self-direction and work both collaboratively and independently as they forge their own path within the Prepared Environment under the watchful eyes of a skilled Montessori teacher.

### HOW LEARNING BEST OCCURS

At Urban Montessori, we believe learning best occurs when the following conditions are in place.

***Children are provided with multiple entry points to learning and authentic assessments that enable them to demonstrate mastery of their learning.***

Guided by highly trained teachers, children engage with Montessori's spiral curriculum in the following ways: via self-directed learning, peer teaching, small group instruction, whole group instruction and Design Thinking Challenges that deeply integrate arts education and design thinking skills into children's day-to-day education. The Montessori materials are a powerful curriculum that allow children multiple entry points to learning a single concept or skill, ensuring children are able to access the lesson and learning regardless of their learning style or processing preferences. Teachers are also skilled at recognizing when children need additional support, or an alternative presentation or recording method and are able to provide these modifications as needed.

All children are assessed against individualized work plans rooted in the CCSS, NGSS, and CSS. Teachers conduct formal and informal assessments in alignment with the School's assessment and student monitoring and growth plans. Montessori teachers continually assess cognitive,

metacognitive, social, and emotional development through observation of each child in the Prepared Environment, noticing how each child interacts with the materials, with peers, and with lessons. These observational data are complemented by robust formative assessments which provide teachers and students alike with data on academic performance, including NWEA growth data, metacognitive skills data, time on task, and evidence of empathy through hours of community service and reflection. Urban Montessori's comprehensive assessment system ensures that all children are able to demonstrate their understanding through a variety of measures.

***Children are given opportunities to learn by solving real world problems within the context of their classroom and community.***

In the Montessori classroom, Integrated Comprehensive Curriculum is specifically designed to provide children with a real world context to understand how what they learn today is relevant beyond the classroom. Leveraging the structures for creativity that are implicit in arts education and design thinking skills, Urban Montessori's projects are engineered to bring change to the School's community in order to connect children's learning with how that learning can improve another's life. Urban Montessori children come to recognize that the impact of their work on their community may be the most authentic of assessments.

***The arts are integrated into the larger curriculum and strategically leveraged to teach specific habits of mind and to ensure children have multiple ways of accessing content and presenting their understanding.***

Urban Montessori teachers collaborate to integrate arts education into daily learning., Rather than provide art projects disconnected from the rest of the curriculum, art is intentionally interwoven into interdisciplinary Design Challenges that ensure children experience the separate disciplines as part of a single toolkit for addressing real world challenges. Urban Montessori Charter School sees arts education and art materials as invaluable for stimulating thinking through an appreciation of the joy of creating art, for addressing academic, social and emotional challenges and for demonstrating mastery of the state and national standards (and Urban Montessori's School goals) by employing of a range of media.

***Children are encouraged to learn by working in a variety of collaborative settings.***

At Urban Montessori, collaboration is the norm. Peer teaching and small and large group settings regularly provide children with opportunities to experience the joy of helping and being helped by others. Children regularly work in partnerships and in small groups on presentations and projects in all areas of the curriculum. Design Challenges present children with authentic opportunities to collaborate on real problems that push them to listen to each other, understand others' perspectives and to present the complexity behind possible solutions.

***Children develop empathy and apply their education to better the lives of others.***

Montessori's Integrated Comprehensive Curriculum, which includes the five Great Lessons and Key Lessons, frame children's interactions and perspectives by recognizing the gifts that all cultures have given to the world. Multi-age classrooms provide varied opportunities to develop understanding of what it means to collaborate with children of different ages. Projects explicitly focus on understanding others and others' needs that are different from oneself within the context of the School's community and the specific problems that exist within that community. Children also reflect on their process, recognizing that how they do their work impacts the quality of that work.

***Children are required to share their work inside and outside of the classroom.***

In Montessori education, children are given the freedom and power to pursue their own curricular interests. At Urban Montessori Charter School, this is enhanced by contextualizing learning with meaningful and relevant Design Challenges meant to impact the School and School community. As such, a critical aspect of the children's education is learning to share their processes, findings and reflections with the broader community and to develop presentation skills to do so. Children understand that a large part of the product of learning is in fact the process of learning. Students are also encouraged and supported to visit other classrooms to share their work. They regularly pair up with children at different levels to teach skills or lessons, act as reading buddies or handwriting guides, or share their learning on a given topic. Through these practices, students understand the importance of their work and are validated in their efforts.

***Teaching is valued as an inquiry into children's needs where data drives the development of solutions.***

Urban Montessori teachers place children at the center of their efforts and demonstrate this commitment by regularly conducting inquiries into their practice. Often a collaborative undertaking, the Schools' teachers' inquiries inform all aspects of a student's education, from how individualized plans are created to how to improve upon the School's assessment offerings. The School's Design Thinking curriculum helps teachers to structure their own research. Also, the School ensures that teachers, children and parents access student growth data via modern technological tools. Teachers routinely evaluate the classroom environment, their own approach, and observational data to ensure each child's needs are met and that they are growing academically.

## OVERVIEW OF CURRICULUM AND INSTRUCTION

### How the Montessori Curriculum Is Organized

Urban Montessori has developed an instructional framework that provides a high level of specificity with respect to the design of our instructional program. It is the tool that teachers and School leadership use to fully implement our program. Within Montessori, curriculum is:

- Organized in alignment with the planes of development
- Aligned to the five great lessons to provide an integrated and comprehensive curriculum
- Facilitated within a prepared environment that supports learning

Many components of this charter and the accompanying appendices are pulled together into this framework document.

- [Please see Appendix A-4 for the Essential Elements of Successful Montessori Schools in the Public Sector](#)
- [Please see Appendix A-5 to see Two Research Studies on the Effectiveness of the Montessori Approach](#)
- [Please see Appendix A-6 for the Instructional Materials](#)

### Overview

Many people, including educators, do not have extensive knowledge of the Montessori approach. The following presents a brief overview of the Montessori curriculum and its organization. Most do not realize that the Montessori approach is in fact a fairly “scripted” curriculum in that specific materials are to be used in specific ways to teach a student specific skills and that these lessons and themes are to be presented in a given multi-age grouping. Unlike her colleagues Piaget or Vygotsky, Montessori moved from theory and research to practice and implementation. There is tremendous

consistency across Montessori classrooms as a result. Montessori teachers are required to be Montessori-certified by an approved teacher training program and are required to use Montessori materials in the implementation of their instructional programs. Particularly in the public education sector, Montessori schools supplement with additional curricular resources, but certain foundational elements and materials are consistent across most classrooms.

The Montessori schedule requires that children have a continuous uninterrupted three-hour core work period where they are not pulled for elective classes, for recess, or other activities. Dr. Maria Montessori observed that children could remain on-task and engaged in learning activities for long periods of time. She theorized that most classes were designed on the assumption that children were unable to remain on-task for long periods of time and aligned transitions and schedules accordingly.

Based upon her observations and research as a doctor and educator, Montessori designed her curriculum to reflect the natural states of child development. These Planes of Development reflect the natural ebb and flow of cognitive and emotional development and take into account what the mind and body are able to absorb at various stages of growth. Montessori connected the Planes of Development with Integrated Comprehensive Curriculum, a curricular organizational strategy that unifies children's education.

### Mapping the Planes of Development

The Planes of Development divide children's growth into four six-year cycles, ranging from birth to 24 years of age. For the purposes of this charter, however, we demarcate the five relevant three-year stages that reflect traditional Montessori student organization between birth and 15 years of age:

- 0-3 Years Old: The Infant Program—not supported by Urban Montessori Schools
- 3-6 Years Old: The Primary Program
- 6-9 Years Old: Lower Elementary Program
- 9-12 Years Old: Upper Elementary Program
- 12-15 Years Old: Adolescent Program

In each stage, there are three organizing concepts that describe the intersection of the child's development and education:

- There is a specific development goal;
- A clearly defined direction is in place to drive attainment of the goal; and
- There are specific sensitivities in each plane that facilitate obtaining the goal.

This notion of sensitivities is critical to a Montessori education. Sensitivities may be thought of as times when a child is primed to achieve particular goals. Sensitive periods may last days, months or years, depending upon the child.

### *The First Plane of Development: Birth to Age 6*

The First Plane is served at school by the Primary program (3-6 years old). Characterized by significant physical and psychological growth, exploration and development, this plane is a time of unconscious development, or the time of the "Absorbent Mind." In alignment with the scientific community's understanding of human development, Montessori believes that more learning takes place at this time in life than during any other. Language, cognitive and motor skills begin to develop and children imitate and begin to create expectations of the world around them. The absorbent mind transitions to the conscious mind around age 3. Emotionally, children in the First Plane have a strong

need for love, acceptance and security, in addition to as much freedom as they can safely handle.

The prepared environment in a Montessori classroom reflects the needs of the First Plane child. Exploration and experience with purposeful activities is central to taking advantage of the natural sensitive periods that typically occur during this plane.

#### *The Second Plane of Development: Age 6 to Age 12*

The Second Plane houses what most typically think of as the heart of childhood and it is served at school by the lower (ages 6-9) and upper (ages 9-12) elementary programs. The conscious mind is behind the child now and the rational/reasoning mind takes its place. Learning occurs more slowly though more steadily. Repetition is less appealing without increased task variation.

Children are increasingly social, culminating in a preference to work with others rather than individually starting at age 6. They have an insatiable appetite for knowledge and a great capacity for concentration. They are interested in learning everything and put forth an intense effort in doing so. Montessori recognized children's interest in the social networks of their immediate environment and in the larger world. Thus, community and cultural awareness are at the core of this plane's sensitive periods and are reflected in the Montessori curriculum via study in mathematics, language arts, cultural studies and science, history, the arts, character education and peace.

Additionally, Montessori identified the Second Plane as a sensitive period for imagination and thus, at this time the curriculum introduces the Integrated Comprehensive Curriculum, which includes the Five Great Lessons and other Key Lessons. Montessori's Integrated Comprehensive Curriculum leverages children's developing creativity and links it to all disciplines in a manner that holistically connects the children to each other and through their learning, to all other things. The curriculum also leverages children's budding sense of right and wrong to develop their growing ability to reason.

#### *The Third Plane of Development: Age 12 to Age 18*

Children in these years (not unlike their peers in the upper end of the Second Plane) can be egocentric, require much food and sleep to fuel their rapid growth and benefit from time on their own. As a result of children addressing their basic developmental needs, Montessori observed that learning might normalize during this plane after the earlier rapid growth. The Third Plane is served at school by the adolescent program (ages 12-15).

In the third plane, children are drawn to opportunities to contribute to causes that support higher ideals. They exhibit a growing ability to impact their community and world, so curriculum in this phase includes more impactful projects such as taking the gardens started in the lower levels and transforming them to resemble farming businesses that serve not just the school, but society. They have a more involved role in fundraising for their program and in problem-solving the needs of their fellow students. To combat the natural emotional turmoil that occurs in human development during this plane, Montessori emphasized the importance of linking learning to the children's emotional state. Without such a connection, learning will be greatly inhibited by the overwhelming needs of the developing child during this time.

#### Integrated Comprehensive Curriculum, The Five Great Lessons and Key Lessons

As was the case with the Planes of Development, Montessori arrived at the concept of integrated comprehensive curriculum as a result of her extensive global research. Although her research took place years ago, the philosophy, approach, and results of Montessori are perhaps even more relevant today as we prepare our children to live in the 21<sup>st</sup> century. Integrated Comprehensive Curriculum provides children with a global vision. It presents a picture of the unity of the universe, which helps

each child to organize their intellect, to understand their place in the world and to develop an appreciation and gratitude for the universe. The Five Great Lessons and the Key Lessons provide a path through the Integrated Comprehensive Curriculum.

The Five Great Lessons, as well as the Key Lessons, convey the interrelationship of all facets of the universe and its inhabitants. Since children in the Second Plane of Development have a burgeoning interest in the world around them and are just beginning to recognize their own imaginative and creative abilities, Montessori opted to introduce these concepts with stories. The stories ignite children’s sense of wonder and effortlessly prompt explorations that are carried out across all curricular areas and place great emphasis on the interconnectedness of all life and learning.

More specifically, the Five Great Lessons:

- Ignite intellectual curiosity
- Spark the imagination of children
- Initiate children's explorations of important questions
- Stimulate children's desire to discover and learn
- Give children an awareness of the natural world and its laws
- Inspire children to explore history, geography, mathematics, the sciences and language arts
- Lead children to contemplate the future
- Instill in children reverence and gratitude for the people and accomplishments of the past

A breakdown of the name of each Great Lesson and its corresponding high-level associated curriculum that is strengthened through the Key Lessons are provided in **Figure A.5**.

**Figure A.5 Five Great Lessons**

<b>The First Great Lesson: The Beginning of the Universe and Earth</b>	<b>The Second Great Lesson: Life Comes to Earth</b>	<b>The Third Great Lesson: Humans Come to Earth</b>	<b>The Fourth Great Lesson: How Writing Began</b>	<b>The Fifth Great Lesson: How Numbers Began</b>
<ul style="list-style-type: none"> <li>● The Universe</li> <li>● The Solar System</li> <li>● Composition of the Earth</li> <li>● Volcanoes</li> <li>● Rocks</li>   <li>● Chemistry: The Three States of Matter</li> <li>● Creation Stories</li> <li>● Plate Tectonics</li> <li>● Constellations &amp; Astronomy</li> </ul>	<ul style="list-style-type: none"> <li>● Bacteria</li> <li>● Plants (classification and parts of: ferns, conifers, and flowering plants)</li> <li>● Fossils</li> <li>● Trilobites</li> <li>● Dinosaurs</li> <li>● Living and Nonliving</li> <li>● Classification Work</li> <li>● Kingdom Animalia (Classification and parts of: insects,</li> </ul>	<ul style="list-style-type: none"> <li>● Ancient Civilizations</li> <li>● Fundamental Needs</li> <li>● Migratory Patterns of Humans</li> <li>● The History of:                             <ul style="list-style-type: none"> <li>● Tools</li> <li>● Food preparation and Storage</li> <li>● Clothing</li> <li>● Shelter</li> <li>● Transportation</li> <li>● Medicine</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>● History of Writing</li> <li>● Hieroglyphic, Cuneiform, and Chinese Writing</li> <li>● Different Alphabets</li> <li>● Different Writing Systems (letters and characters)</li> <li>● Ancient Civilizations</li> <li>● The Printing Press</li> </ul>	<ul style="list-style-type: none"> <li>● History of Numbers</li> <li>● History of Mathematics</li> <li>● Different Number Systems</li> <li>● How ‘zero’ came to be</li> <li>● The invention of the Calendar                             <ul style="list-style-type: none"> <li>● Systems and Units of Measurement</li> <li>● Trade and Currency</li> </ul> </li> </ul>

	amphibians, reptiles, birds, mammals) ● Oceans and Ocean Life ● Supercontinents (Pangaea, Laurasia, Gondwanaland) ● Continents ● Mountains ● Oxygen & Carbon Dioxide	● Defense ● Art ● Religion and Spirituality		● Economic Geography
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The stories presented by the Great Lessons are intentionally geared toward children's interests and natural states of development and serve as a central organizing framework for student learning. In addition, there is nothing about how Montessori curriculum is organized that is at odds with Urban Montessori's desire and requirement to teach to the CCSS, NGSS, and CSS. In upcoming sections of our application, the School will present specific curriculum maps to demonstrate exactly how Montessori curriculum and the CCSS, NGSS, and CSS will be aligned.

The Role of the Prepared Environment in the Montessori Classroom

The Montessori prepared environment warrants additional attention because the classroom and the materials within play such an important role in student learning. Most important to understand is the fact and requirement that the entire classroom is intentionally designed for children based upon the science of child development. Because of this, Montessori classrooms across the globe will look very similar – they all draw upon the same 100+ year body of knowledge that leverages children’s natural inclination to learn regardless of race, culture, gender and socio-economic status.

The prepared environment is wholly geared to maximize children’s independent learning and exploration. Given individualized learning plans, children may choose what they want to work on, with whom and where they’d like to work, and may do so at their own pace as teachers observe, teach, and guide them to master learning outcomes. The environment, which includes both the physical space and the multi-age class groupings, directly shapes the children’s experience and their ability to be successful. The physical space is very intentionally organized to enable children to work productively with the materials in the classroom. All materials are set out in an orderly and purposeful manner throughout the classroom on low shelves enabling children to access the curriculum without teacher support.

- Please see Appendix A-7 for Photos of an Elementary Montessori Classroom. For videos, please see <https://vimeo.com/164509426>.

There are four aspects of the prepared environment that illustrate its impact, as described below.

*Freedom*

A central tenet of Montessori’s pedagogy and philosophy holds that children must be free to follow their natural interests, leading to opportunities to develop their potential and increasing their

knowledge of the world. Within the prepared environment, the child must experience freedom in a number of ways, including: movement, exploration, ability to interact socially, and the freedom to learn and grow without interference from others.

#### *Structure and Order*

On the surface, structure and order may seem at odds with the importance of freedom in the prepared environment. The prepared environment is meant to reflect the considerable structure and order of the real world and presents an organized system that children must learn to understand in order to make sense of their surroundings and, ultimately, the world. The ordered environment supports children's ability to reason and provides consistent opportunities for children to validate their expectations and interactions with the world around them in predictable and consistent ways. Materials are ordered from simplest to complex, in well-defined spaces to support each curricular area. Only a select few of each material are placed on the shelf, to intentionally foster patience and cooperation. Classrooms are designed to meet the needs of the children, entice and inspire students to work, and to ensure their safety and comfort.

#### *Social Environment*

The multi-age classroom groupings provide tremendous benefit to children as part of the prepared environment. Any number of benefits accrues to children as a result of learning within the Montessori social environment. The opportunity to be the youngest, middle and oldest student cohort over time affords children unique perspectives and experiences at each stage. At different times they receive help from older children or aspire to do things that older children do, they serve as role models or mentors for younger children and they have regular opportunities to develop compassion and empathy for others. In addition, children's ability to work and play in a variety of group settings is explicitly supported by the social environment that is intentionally created as part of Montessori's methodology.

#### *Intellectual Environment*

The prepared environment ultimately aims to develop the whole child – not just the intellect – but intellectual development will not occur without the previously mentioned aspects of the environment in place. The above aspects of the prepared environment, coupled with the Montessori curriculum and unique Montessori materials, support children in moving from simple to complex ideas and from concrete to abstract understanding and manages to do so in a way that is truly individualized and differentiated.

### **PRACTICES INTEGRATED INTO MONTESSORI**

In addition to the Core Practices detailed above, at Urban Montessori additional practices are integrated across the curriculum. These include:

- Social-Emotional Curriculum
- Reader's and Writer's Workshop
- Design Thinking
- The Arts

### **Integrating Social-Emotional Curriculum into Montessori**

Central to Montessori curriculum is the development of children who are able to function successfully in society. At Urban Montessori, character and peace education is core to the curriculum. Every member of the community is responsible for modeling respect. This includes respect for self, respect for others (including animals), and respect for the environment (at school, at home, and beyond).



### Modeling

Everything about the culture of Montessori classrooms and schools is intentional. In some traditional school environments, a teacher or adult may be considered the “Learned One” or bringer of knowledge. The goal may be to literally “open minds” to “add knowledge or information.” In contrast, at Urban Montessori, adults and children co-create knowledge by participating in learning together. Modeling appropriate behaviors, attitudes, and habits is done by all members of the community, children and adults.

### Peace Table/Corner

Each classroom and outdoor space has a place designated for children to meet to resolve conflicts. In many classrooms, this is a low table called the “Peace Table.” Some classrooms place the table in a quiet corner and call it the “Peace Corner.” The table or area is meant to be inviting, cozy, and tranquil. Any colors used are soothing; if lights are used, they’re dim; floor pillow or bean bags may be used; water fountains may be used. Books on peace may be displayed. This builds on the early childhood experience of the “Peace Rose.”

Many aspects of the School contribute to the development of peace and respect, including integrating these social-emotional learning programs into the Montessori environment:

### Toolbox Curriculum

The School uses Toolbox, a research-based social-emotional learning curriculum that teaches critical social competencies necessary for academic and life success such as resiliency, self-management, and responsible decision-making skills. Below is a list of the tools.

1. Breathing Tool
2. Quiet/Safe Place Tool
3. Listening Tool
4. Empathy Tool
5. Personal Space Tool
6. Using Our Words Tool
7. Garbage Can Tool
8. Taking Time Tool
9. Please and Thank You Tool
10. Apology and Forgiveness Tool
11. Patience Tool
12. Courage Tool

### Positive Discipline

The School uses Positive Discipline, a program designed to teach young people how to be responsible, respectful, and resourceful members of their communities. Positive Discipline lessons focus on Developing Classroom Agreements and Routines, Classroom Jobs, Positive Time Out, Self-Calming, Self-Awareness, Emotional Awareness, Communication Skills (I-Messages, Listening, and Non-verbal Skills), Mutual Respect, Building Cooperation, Learning About Mistakes, Encouragement, and Respecting Differences. Students practice Class Meetings that include Focusing on Solutions, Brainstorming, and Role-playing.

### Mindfulness

The School uses a series of 16 lessons developed by Laurie Grossman of Mindful Impact. The lessons focus on Sitting and Sound, Breathing and Distractions, Gratitude, Feelings, Body Scan,

Affecting Others and “Filling” or “Emptying” Others’ “Buckets, Preparing for Tests, Walking Mindfully, Reacting or Responding, Sending Kind Wishes, Empathy, Eating Mindfully, and Developing Mindful Habits. To complement these lessons, the School also uses Inner Explorer, a series of short audio tracks online to guide students through Mindfulness.

### **Integrating Reader’s and Writer’s Workshop into Montessori**

Urban Montessori recognizes the importance of Balanced Literacy in our Language instruction. We are committed to using research-based best practices to ensure all scholars succeed. A balanced approach to literacy teaches various skills in varying settings. We understand that the components are not stand-alone but instead rely on each other to build proficiency. Often teachers use a “whole-part-whole” approach, where the concept or skill is taught in context, then examined more closely and explicitly, and then brought back into the whole picture again.

Balanced literacy components may vary per level and most often include:

- Read Aloud
- Shared Reading and Writing
- Interactive Reading and Writing
- Reader’s Workshop
- Writer’s Workshop
- Word Study, including Phonemic Awareness, Phonics, Grammar, Vocabulary, High Frequency Words
- Guided Reading

Teachers recognize that there are times when instruction may be more isolated in its practice. However, students are made aware of the purpose of such activities: how they enable us to become stronger readers and writers.

Urban Montessori is proud and excited to continue our work with the Lucy Calkins’ Units of Study for Reading and Writing.<sup>8</sup> This work is also made possible by our commitment to the Montessori Language sequence and Grammar Work.<sup>9</sup>

A question we hear frequently is: Why are you doing a Workshop model in a Montessori classroom? How will children go at their own pace? This is a brilliant question and one we have thought about deeply. We utilize the workshop model to build a community of readers and writers who learn that the purpose of reading is to comprehend text and make meaning. Writers learn that they have a voice and a real audience with whom to share their thoughts and information. Our scholars also develop a strong sense of agency.

The workshop model follows a basic structure:

1. Mini-Lesson
2. Conferring and Small Group Work
3. Partnerships
4. Share

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<sup>8</sup> More information on the Lucy Calkin’s Reader’s and Writer’s Project and Units of Study are available at <http://readingandwritingproject.org/> and <http://www.heinemann.com/unitsofstudy/>.

<sup>9</sup> More information on the Montessori Phonics program is available at <http://www.blog.montessoriforeveryone.com/montessori-basics-8-pink-blue-and-green-series.html>.

The mini-lesson is one that excites and connects children to the work they are doing. Teachers may model a strategy or use guided practice or inquiry. Students are then actively engaged in ‘trying out’ the strategy before they set off for independent work time. The Conferring and Small Group Work is where the magic happens! The majority of students are working independently applying the many strategies and skills that have been introduced throughout their day. This time is also when students receive personalized instruction, similar to the Work Period. Teachers may confer with children individually or may notice that several students are working on a similar skill and provide needed instruction to a small group.

Both reader’s and writer’s workshop models follow this structure, and students come to learn the predictability of the workshop time. Our school also recognizes that the reading and writing process is just that, a process. We accept student approximations with their work. We emphasize content and quality over quantity and neatness. We want students to recognize their own process and understand that our work can always be revised. We are apprenticing our scholars in the life of avid readers and writers, not expecting carbon copies. However, we do recognize the exhilarating need for Publication and authentic audiences! Classrooms often have celebrations to highlight and honor the work that was done in a particular unit!

### Assessing Literacy Levels of Scholars

Urban Montessori teachers use a combination of formal and informal assessment practices. Firstly, we observe what children are doing in the moment. Then, we see where they are in their learning progression and where they have yet to go. Teachers have the opportunity to observe students working with the Montessori materials as well as study their writing. We also utilize Running Records to gain a snapshot of what a reader is doing and what he or she may need next. During a Running Record we sit down with one child and listen to him or her read a text while noting any errors or self-corrections, and later we analyze how they are tending to visual, semantic, and syntactic cueing systems. This is work we are excited to build upon from last year.

Urban Montessori continues to use the Fountas and Pinnell Leveled Literacy Instruction as well as Response-to-Intervention, RTI, practices with our scholars who are performing significantly below grade level.<sup>10</sup> Students who qualify for English Language Development instruction will also receive extra language lessons in addition to their core language work that occurs in the classroom.

### **Integrating Design Thinking into Montessori**

Urban Montessori supports the children of Oakland children in growing up with the knowledge that they can be innovators who have the power to change the world around them. The human-centered design process is symbiotic with tenets of the Montessori Method and the integrated, project-based curriculum of Urban Montessori. Purposeful, service-oriented, creative-action projects driven by the design thinking process are a hallmark of Urban Montessori.

Urban Montessori defines design thinking as the ability to use a systematic process to understand people and situations, define problems, and come up with innovative solutions. Design challenges are integrated learning projects where children go through the steps of the design thinking process. They can be short, designed to introduce phases of the process quickly, or they can be long to allow for in-depth investigation into integrated curriculum components.

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<sup>10</sup> More information on Fountas and Pinnell Leveled Literacy Instruction is available at <http://www.fountasandpinnell.com/li/>.

There are two primary types of design challenges:

- Process-focused: primary learning is on the steps of the design thinking process and how it can be applied to novel contexts
- Curriculum-integrated: design thinking process integrated with the great lessons or other subject matter content

Phases of the Design Thinking Process

*Empathize*

The first phase of the design thinking process is to understand the problem. During this phase, children immerse themselves in learning about issues related to the Design Challenge. They access a wide array of resources, research and dive deep into the content and context of the challenge, and use empathy to shift their perspective on a problem. One must be aware of what is already out in the world in order to know whether one’s ideas are innovative or not.

Children observe users as they interact with objects or other people as a key part of the design process. Designers use these observations to drive question generation and interviews and practice active listening and curiosity. They collect notes, sketches, photographs, videos, and artifacts to help with later analysis and synthesis of needs.

*Define*

Children reflect on what they learned in the empathize phase and synthesize the needs of users. Then, they make inferences about the meaning that underlies those needs. Designers develop a point of view based on a specific user that helps establish parameters for the active design work. Building insight through synthesis is a key driver of the design process.

*Ideate*

Children generate large numbers of ideas fluidly using brainstorming rules and other techniques. In a supportive classroom environment, children are challenged to become silly, savvy risk takers, wishful thinkers and dreamers of the impossible...and the possible. They work on their Design Challenges open to unexpected ideas and new possibilities as a team where everyone contributes, defers judgment and builds on others’ ideas. Collaboration, while a part of the entire design process, is emphasized here.

*Prototype*

Children create prototypes – two- or three-dimensional low-resolution representations – of ideas that have been generated. Many children build to think as new and different ideas are inspired with materials in hand. Building skills are also taught so that prototyping can proceed from low-resolution to higher resolution as children advance. Via prototyping, children learn to convey ideas quickly. Every prototype is created with the purpose to learn something specific by testing it, often with users.

*Test*

Through testing designers learn what works and what doesn’t and then iterate. This means going back to their prototypes and modifying them based on observations of users interacting with their prototypes and user feedback. Examples of Design Challenges are provided in **Figure A.6**.

**Figure A.6 Example Design Challenges**

Examples - Design Challenges	Focus	Children Experience
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<p>Design a tool (TK/K)</p>	<p>Introduce the concept of designer, design thinking process and vocabulary</p>	<p>Children gain confidence as makers through a series of activities introducing building materials and techniques. Following reading of a book in which a character experiences a physical challenge, children are led through some empathy building step to understand the character’s experience and identify their needs. Students then brainstorm solutions for at the character could use to overcome their challenge, build prototypes of their tools, and present prototypes to peers. All phases of the design thinking process are introduced: empathize, define challenges,, brainstorm ideas, build prototypes, share prototypes, and get feedback</p>
<p>Build a model home (1-3)</p>	<p>Complete design cycle, with focus on empathy and prototyping</p>	<p>As part of a larger unit on basic needs, children focus on shelter. They immerse themselves in a study of homes from different parts of the world. They interview family members about their homes or wish for a home. They infer and map needs. They make drawings and brainstorm materials they would like to use to build model homes. They build models and write about the experience.</p>
<p>Transporting water (4-6)</p>	<p>Focus on testing, feedback and iteration</p>	<p>As part of a larger unit on ancient civilizations, students build awareness of the important role water transportation and distribution could play in human societies as they developed agriculture and cities. Students also do research on some contemporary examples of water access issues. After other immersive activities such as a water transportation relay race, and an introduction to materials and tools, students work in teams using the design thinking cycle to create, test and iterate systems to distribute water to the school’s outdoor garden beds.</p>
<p>Understanding waste (7-8)</p>	<p>Focus on understanding systems, identifying problems within systems, and finding opportunities to make positive change</p>	<p>Children immerse themselves in the topic of waste management by studying historical examples of waste management practices and innovations and by working with a waste management computer simulation. They track and map waste as it moves through their community and use a <i>parts, purposes, complexities</i> thinking strategy to create diagrams of the systems in their community. They identify waste-related issues they would like to work on. They brainstorm and prototype solutions. They share prototypes with experts in the waste management system to learn more. They revise their prototypes to integrate into the systems they have learned about.</p>

- [Please see Appendix A-8 for an overview of Arts and Design Thinking Integration](#)
- [Please see Appendix A-9 for a sample Design Challenge Unit](#)

Implementation of Design Thinking

At Urban Montessori, teachers utilize a structured approach to develop design cognition and design learning that enables children to build creative confidence and enact positive change in the world. Children engage in hands-on projects that focus on building empathy, promoting a bias toward action, encouraging ideation and fostering active problem solving. Using one’s imagination is central in this process as is building competency in learning-to-learn skills such as working in groups, following a process, defining problems and creating solutions.

Children understand that sharing their work and thinking is an integral part of the design thinking process as it allows for everyone to learn from each other's work. Developing focused and coherent presentations that convey their perspectives with solid reasoning may be included in the process. Acquisition of multi-media presentations skills will be developed so that children use the selected media skillfully, editing appropriately and monitoring for quality. Where appropriate children work with community partners to implement design projects.

Preliminary educational research indicates that design thinking skills aid children in core subject areas and deepen academic content learning while building cognitive and social skills.<sup>11</sup> Further, as we move into the 21st century, the ability to be an adaptive Design Thinker who can respond flexibly to complex problems, communicate effectively, manage information, collaborate and produce new knowledge is increasingly essential for success. Thus, bringing design thinking to TK-12 is, at its core, an issue of equity. At Urban Montessori, our interdisciplinary Design Thinking curriculum helps us deliver on our vision of developing children who can confidently identify and address real challenges facing their peers, families, community, city and world. Additionally, the human-centered design process is symbiotic with tenets of the Montessori method and the integrated, project-based curriculum of Urban Montessori Charter School.

### **Integrating the Arts into Montessori**

At Urban Montessori Charter School, the Arts play an integral role in the Montessori classroom. Artistic concepts, processes and materials are presented daily in the prepared environment in order to engage children's multiple intelligences. The Urban Montessori arts curriculum builds artistic skills in visual arts, music, movement and theater, while nurturing artistic habits of mind in all children ages TK-8. Arts Integration provides children with opportunities to demonstrate understanding of science, language arts, math, history or cultural topics through creative and expressive projects, while "Art for Arts' Sake" helps children begin to explore and eventually master artistic skills like cutting, drawing, color mixing, rhythmic patterning, or choreographing dance scores. Both trajectories help Urban Montessori children develop a full sense of their artistic and intellectual strengths given this integrated, multi-faceted approach to learning, creating and communicating.

#### Arts Integration

Arts integration provides children creative opportunities to express their understanding of a specific topic or content area, and to develop artistic habits of mind that span academic disciplines. For example, children might mimic a scientist by observing plants and seeds closely, and depict their observations in a field journal. With this new scientific knowledge, children might then create an imaginative project where they sculpt seeds and create seed packets of 'power plants' that heal a social ill. Or, children might research immigration and migration by conducting an interview with an immigrant. To express the immigrant's' journey they might create a metaphorical suitcase filled with stories, maps and objects expressing the immigrant's journey. By integrating art with core disciplines, children make stronger connections to the world, their culture, the culture of others, and themselves.

- [Please see Appendix A-8 for an overview of Arts and Design Thinking Integration](#)

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<sup>11</sup> Carroll, M., Goldman, S., Britos, L., Koh, J., Royalty, A., Hornstein, M., (2010) *Destination, Imagination, and the Fires Within: Design Thinking in a Middle School Classroom*, International Journal of Art and Design Education. Volume 29, Issue 1, pp. 37-53. Kolodner, J. L., Camp, P. J., Crismond, D., Fasse, B., Gray, J., Holbrook, J. & Ryan, M. (2003) *Promoting deep science learning through case-based reasoning: rituals and practices in learning by design classrooms*, in N. M.Seel [Ed.] *Instructional Design: International Perspectives*. Mahwah, NJ : Lawrence Erlbaum Associates, pp. 89-114.



### Arts for Arts' Sake

Creating art for the pure joy of self-expression is important to the intellectual, social and emotional growth of every child. Montessori curriculum validates every child's right to express and communicate his or her ideas non-verbally. Be it visual, musical, theatrical, or kinesthetic, mastery of artistic materials in service of personal expression is important to each child's ability to define self, communicate, and engage and persist through problems.

### Art History and Cultural Context

Art History and Cultural Context provide children with perspectives on what and how art is used in different cultures, as well as how art has changed over the course of history. By studying art from around the world as well as contemporary art that deals with current issues, Urban Montessori children gain a sense of understanding of how art is a vehicle for meaning-making in our diverse culture.

### Artistic Habits of Mind

All art in the Montessori classroom focuses on the process of making over the finished product. The eight Studio Habits of Mind, drawn from Harvard's Project Zero Studio Thinking Framework, put equal emphasis on eight, disposition-oriented habits of mind in addition to the more traditional habit 'develop craft' or artistic skill. This framework helps children articulate their thinking and tap into their own strengths as learners. The eight Studio Habits of Mind are: Develop Craft, Observe, Stretch and Explore, Envision, Express, Engage and Persist, Reflect and Understand Art World (or History World, Science World, Literary World, etc). The Studio Habits of Mind give teachers and children a common language to discuss artistic process as well as learning strategies. These habits dovetail with Design Thinking processes of Research (Observe, Understand Art World), Observation (Observe), Synthesis (Reflect, Question and Explain), Ideation (Envision, Express, Develop Craft, Stretch and Explore), Prototyping and Testing (Reflect, Engage and Persist, Develop Craft), and Presentations (Reflect, Understand Art World). In both subject areas, children are specifically taught to be 'mindful of process' — that is, meta-cognitively aware of the core steps they must practice in order to achieve the results they desire.

## **THE PRIMARY MONTESSORI CURRICULUM (SERVING CHILDREN AGES 3-6)**

### **Overview**

The Montessori Primary Curriculum spans three years of development. For the purposes of the charter, the last year of the Montessori Primary Curriculum is the Transitional Kindergarten and Kindergarten years for most children. The Montessori Primary Curriculum is composed of nine interwoven curricular areas:

- Practical Life
- Sensorial
- Mathematics
- Language
- Cultural Studies and Science
- The Arts (Visual Arts, Music, Drama, Creative Movement)
- Design Thinking
- Character Education and Peace
- Physical Education and Health

In addition to imparting core academic skills in math and language, the Montessori Primary Curriculum is designed to foster independence, coordination, problem solving, scientific thinking, socio-emotional development, and creative arts skills. However, the fundamental goal in the first plane of development is for children to develop themselves as individual beings and to master the process of learning, thereby creating a solid foundation for personal and academic success.

Accountability in this differentiated model is assured through use of Work Plans. Activities are selected based on the child's interest, ability, and age, within the context of the state standards for that grade level. The Work Plan is teacher-provided and activities are teacher checked once completed by the student. In this way, children develop specific skills in collaboration with their teachers and a classroom environment that is prepared for them.

## Areas of Curriculum

### Practical Life Overview

Practical Life activities encourage the development of independence and foster each child's adaptation to the social context of his or her environment. At the Primary level, Practical Life activities include care of self, care of the environment, exercises of grace and courtesy, and control of physical movement.

#### *Goals*

Although the activities are largely skill oriented (e.g. learning how to wash a table), their purpose is not that children master these tasks for their own sake. Rather, the primary goal is to aid each child's inner construction of discipline, organization, independence, and self-esteem through concentration on precise and full cycles of activity.

#### *Objectives*

Development of sense of order, independence in navigating classroom, fine and gross motor control, ability to concentrate.

### *Instructional Strategies & Materials*

#### Care of the Self

- Dressing Frames: buttons, zippers, snaps, hooks and eyes, buckles, bow tying, safety pins, lacing
- Personal Care: nose blowing, getting a drink, hand washing, dressing and undressing, taking off a coat, hanging up a coat, putting on a coat, putting on an apron, using the bathroom
- Grooming: hand washing, clothes washing, shoe polishing, hair combing, hair brushing, braiding, nail buffing, nail clipping

#### Care of the Environment

- Setting up for an activity: Rolling/unrolling/carrying a rug, carrying a tray, carrying a bucket, using a book, sitting at a table, carrying a chair, carrying a table, opening/closing a door
- Cleaning: Wiping up spills, crumbing a table, sweeping, table scrubbing, dish washing, cloth folding
- Polishing: mirror, wood, and metal polishing
- Plant Care: Plant watering, leaf polishing, flower arranging
- Pet Care: pet feeding, environment cleaning

#### Food Preparation

- Cutting: fruit, vegetable and bread cutting



- Juicing: fruit juicing
- Spreading: butter, jelly, cream cheese spreading
- Measuring: measuring spoons, measuring cups
- Grating

#### Movement

- Pouring, squeezing, twisting, pinching, pincer grasp, sorting, walking on a line, playing the silence game, transferring, hammering, gardening

#### Social Interaction Skills

- Introducing yourself, greeting, saying goodbye, how to ask for help, how to get a teacher's attention, how to say "Excuse me," how to observe someone who is busy, how to walk indoors, how to talk indoors, beginning to recognize and name emotions, participate in conflict resolution

#### Sensorial Overview

The Sensorial Curriculum consists of concrete manipulatives that enable young children to discriminate, order, and classify sensory impressions in relation to length, size, color, pitch, smell, weight, texture, etc. The addition of language gives children a beginning "scientific vocabulary" to describe and compare qualities of objects. The materials are divided into eight subcategories, detailed below.

#### *Goals*

The Sensorial Curriculum has two primary goals, one direct and one indirect, both of fundamental importance. The direct goal is to educate and refine each child's sense perceptions and to provide vocabulary to describe those perceptions. The indirect goal is to assist children in the development of their intelligence, which is dependent upon the organizing and categorizing of their sense perceptions into an inner mental order.

#### *Objectives*

Development of visual discrimination of dimension, ability to concentrate, ability to place objects in seriated order, problem solving skills, hand-eye coordination, stereognostic sense, discrimination of shape and form, understanding of geometric shapes, fine motor skills, visual discrimination of color and shade, auditory discrimination, tactile discrimination, baric sense, thermic sense, olfactory sense.

#### *Instructional Strategies & Materials*

- Visual Sense, Cylinders: Knobbed Cylinders, Knobless Cylinders
- Visual Sense, Dimensional Materials: Red Rods, Broad Stairs, Pink Tower
- Visual Sense, Geometric Shape: Geometric Solids, Geometric Cabinet and Cards, Constructive Triangles
- Visual Sense, Algebraic Materials: Square of Pythagoras, Binomial Cube, Trinomial Cube
- Visual Sense, Colors and Patterns: Color Tablets, Patterned Fabric Squares
- Auditory Sense: Sound Cylinders, Bells
- Tactile Sense: Rough and Smooth Boards, Tactile Tablets, Tactile Fabric Squares
- Complex Senses – Baric, Thermic, and Olfactory: Baric Tablets, Thermic Tablets, Smelling Bottles, Tasting Bottles

#### Mathematics Overview

Through the manipulation of concrete materials, the child internalizes concepts of number, symbol, sequence, memorization of basic facts, and basic operations. The materials simultaneously reveal

arithmetic, geometric, and algebraic correlations. The materials are divided into nine categories, detailed below.

### *Goals*

As with the other curricular areas, the Mathematics Curriculum has two primary goals, one direct and one indirect. The direct goal is for each child to learn concepts of numeration, counting, number formation, basic math operations, decimal system, place value, fractions and the memorization of math facts in addition, subtraction, multiplication and division. The indirect goal is to assist children in the development of their intelligence by refining and expanding their ability to concentrate, follow a process, work independently, problem solve, and complete the full cycle of a task.

### *Objectives*

Introduce and associate quantities and numbers 0-9,999, develop ability to place objects in seriated order, introduce concept of number as a symbol for a collection of separate objects, develop ability to count independently to 9,999, develop ability to follow verbal directions, introduce the decimal system, introduce process of exchanging in decimal operations, introduce and develop ability to perform addition, subtraction, multiplication, and division operations, memorize basic math facts, provide a concrete introduction to the concepts of squaring and cubing, introduce skip counting, provide concrete introduction to fractions, introduce fraction vocabulary.

### *Instructional Strategies & Materials*

- Linear Counting Materials: Number Rods, Sandpaper Numerals, Spindle Boxes, Numerals and Counters, Short Bead Stair, Memory Game, Snake Game Search for Ten, Teen Board, Ten Board, One Hundred Chain and Labels, One Thousand Chain and Labels, One Hundred Board and Numerals, Squaring Chains: One Through Ten, Cubing Chains: One Through Ten
- Decimal System: Introduction to/Association of Quantity and Symbol, Formation of Numeral Cards, Addition/Regrouping with the Golden Beads, Subtraction/Regrouping with the Golden Beads, Multiplication/Regrouping with Golden Beads, Division/Regrouping with Golden Beads; Addition, Subtraction, Multiplication, and Division with the Stamp Game; Addition with the Dot Board, Addition and Subtraction with the Bead Frame
- Memorization: Addition Strip Board, Addition Charts, Oral Games for Memorization of Addition, Addition Snake Game, Bead Bars for the Memorization of Addition, Addition Story Problems, Subtraction Strip Board, Oral Games for the Memorization of Subtraction, Subtraction Snake Game, Subtraction Story Problems, Multiplication Bead Board, Multiplication Charts, Oral Games for the Memorization of Multiplication, Multiplication Story Problems, Snake Game for Memorization of Multiplication, Cubing Chains for the Memorization of Multiplication, Bead Bars for the Memorization of Multiplication, Construction of the Decanomial, Powers of Numbers, Division Bead Board, Division Charts, Division Story Problems, Oral Games for the Memorization of Division
- Fractions: Concept of Fraction/Not Fraction with Skittles, Metal Insets, Card Material, and Geoboard; Concept of Denominator and Written Denominators, Concept of Numerator and Written Numerators, Addition and Subtraction of Fractions with the Same Denominator
- Money (Linear Counting and with Decimal System): One Cent Coin, Making Sets of Cents, Ten Cent Coin, Twenty-Five Cent Coin, One Dollar Bill, Ten Dollar Bill, Money Layout, Shopping with Money, Making Change with Money

### Language Overview

Language is interwoven throughout all aspects of the classroom curriculum. Specific language activities include oral language, written expression, and reading in alignment with the CCSS in ELA

and the California ELD Standards for English Learners. The Primary Language Curriculum builds upon oral language to discover the relationship between sound and symbol. This discovery enables the child to make his or her own thoughts visible (writing) and to decipher the thoughts of others (reading). Further activities spark conscious awareness of the order and function of words (grammar).

### *Goals*

As with the other curricular areas, the Language Curriculum has two primary goals, one direct and one indirect. The direct goal is for each child to learn concepts of oral communication, written expression, and reading. The indirect goal is to assist children in the development of their intelligence by refining and expanding their ability to concentrate, follow a process, work independently, problem solve, and complete the full cycle of a task.

### *Objectives*

Development of phonetic awareness, letter/sound recognition, spoken vocabulary, handwriting ability, letter and sentence formation skills, beginning grammar skills, and reading skills including phonetic words, consonant blends, sight words, phonograms, reading analysis, and early reader books.

### *Instructional Strategies & Materials*

The Teacher's College Reader's and Writer's Workshop is integrated into the primary classroom to support language development, as detailed above in the Curriculum and Instruction Overview. In addition, the Zoophonics program is leveraged to support development in phonics and Handwriting Without Tears is used to support development in writing.<sup>12</sup>

Within the prepared environment, the following strategies and materials are used to support language development.

- Receptive Language and Expressive Language: Naming of Materials, Use of Adjectives, Concept Formation, Weather Report, Names of Children, Vocabulary Development with Phonic Objects, Pictures, and Sensorial Materials; Vocabulary Comparatives and Superlatives, Nomenclature Long Range Booklet Projects, Line Activities, Informal Discussion at Group Time, Aural and Oral Games, Creative Storymaking, "I Spy" Game, and Silence Game
- Visual Discrimination: Puzzles, Object to Object Matching, Object to Picture Matching, Picture to Object Matching, Picture to Picture Matching, "Look Alikes" Matching, Whole to Parts Activities (Nomenclature Cards, Scenes), Parts to Whole Picture Formation, Figure/Ground Matching, Spatial Relationships, Graphic Matching, Sandpaper Letter and Moveable Alphabet Matching, Patterning, What's Missing Activities
- Concept Development: Association, Opposites, Rhyming Objects, Classification (Kinds of, Categories, Doesn't Belong), Picture Sequence
- Handwriting: Metal Insets, Sandpaper Letters, Writing in Grain, Writing on the Chalkboard, Writing on Paper, Forming Letters, Tracing the Child's Name
- Preparation for Reading: Whole to Parts Nomenclature Cards, Vocabulary Development, Initial Sound Matching with Objects or Pictures, Sandpaper Letters with Pictures, Blending Sounds with Objects or Pictures
- Reading: Moveable Alphabet, Word Labels, and Word Lists with Short Vowel Sounds; Sandpaper Letters, Moveable Alphabet, Word Labels, and Word Lists with Consonant Blends; Sandpaper Letters, Moveable Alphabet, Word Labels, and Word Lists with Phonograms; Sight

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<sup>12</sup> More information on Zoo Phonics is available at <http://zoo-phonics.com>. More information on Handwriting Without Tears is available at <https://www.hwtears.com/hwt>.

## Words; First Books; Grammar and Parts of Speech through the Use of Concrete Objects and Games

### Cultural Studies and Science Overview

An ecological perspective highlights the interrelationships of the earth, its flora and fauna, and human life. The Cultural Studies and Science Curriculum materials allow children to order simple classifications of non-organic and organic forms and to identify basic parts of plants and animals. Each child discovers the richly varied way in which people meet the same basic needs in relation to differences in topography, climate, and natural resources. Simple experiments with magnets, electricity, etc. allow children to explore the physical sciences with concrete manipulatives.

#### *Goals*

The goals of the Cultural Studies and Science Curriculum are to provide children with a basic scientific vocabulary for understanding and communicating about the world around them and to engender an understanding of the earth as a unified system.

#### *Objectives*

Introduce the scientific method, support the development of a global perspective, introduce basic scientific vocabulary, develop an understanding of basic needs of living things, and develop an understanding of parts/whole relationships

#### *Instructional Strategies & Materials*

- Geography: Sandpaper Globe, Land and Water Forms, Colored Globe, Political Maps and Labels, Geography Pictures, Flags of the World, Directions, Hemispheres
- History: Time as related to the clock, classroom schedule, the calendar (days, months, years), timelines, and personal timelines
- Botany: Living/Non Living Classification; Plant/Animal Classification; Observation of Plants, Fundamental Needs of Plants, Parts of the Plant; Parts of the Root, Shapes of the Root, Function of the Root; Parts of the Stem, Function of the Stem; Parts of the Leaf, Shapes of Leaves, Veins of the Leaf; Parts of the Flower; Parts of the Fruit; Parts of the Seed; Care of Classroom Plants
- Zoology: Living/Non Living Classification; Plant/Animal Classification; Care, Observation, Parts, and Simple Nomenclature of the Fish; Care, Observation, Parts, and Simple Nomenclature of the Amphibian; Care, Observation, Parts, and Simple Nomenclature of the Reptile; Care, Observation, Parts, and Simple Nomenclature of the Bird; Care, Observation, Parts, and Simple Nomenclature of the Mammal; Nomenclature of the Human Being; Life Cycles of Animals

### The Arts (Visual Arts, Music, Drama, Creative Movement) Overview

The arts are integrated into the daily life of the classroom. Fundamental techniques (pitch, rhythm, use of specific artistic media, movement patterns) are presented in isolation to assist each child in developing a personal repertoire of skills. The children then use these skills to express their own ideas and feelings, to more deeply explore other content areas in the curriculum and to join with others in communal celebration and expression. Children are also introduced to a wide variety of styles of artistic expression, developing an appreciation for the contributions of artists both known and unknown.

*Goals*

The goal of the Arts Curriculum is to introduce children to the concepts of artistic expression and to develop basic techniques as a vehicle for their own expression.

*Objectives*

Develop basic art expression techniques, develop a basic arts vocabulary, refine fine/gross motor control, develop an appreciation for aesthetic beauty, refine auditory discrimination, and develop rhythm.

*Instructional Strategies & Materials*

- Visual Art: There are no prescribed art materials. However, art materials are kept on their own section of shelving in the classroom. The materials are available as a choice just as are the rest of the materials in the classroom environment.
- Music: Bells, rhythm instruments, teacher-led songs and activities
- Drama: Teacher-led games and activities
- Creative Movement: Teacher-led games and activities

Design Thinking Overview

Children gain confidence as makers through a series of activities introducing building materials and techniques. All phases of the design thinking process are introduced: empathize, define challenges,, brainstorm ideas, build prototypes, share prototypes, and get feedback

*Goals*

The goal of the Design Thinking Curriculum at the Primary level is to introduce the concept of designer, areas of the design thinking process (Notice and Care, Work Together and Create, Share and Reflect) and vocabulary and materials related to the design thinking process.

*Instructional Strategies & Materials*

Following reading of a book in which a character experiences a physical challenge, children are led through some empathy building step to understand the character's experience and identify their needs. Students then brainstorm solutions for at the character could use to overcome their challenge, build prototypes of their tools, and present prototypes to peers.

Character and Peace Education Overview

Character and Peace Education is arguably the core of the Montessori Primary Curriculum. The threads of this curriculum area are present and interwoven throughout the classroom. It begins in Practical Life, where each child learns to care for him or herself as well as their shared environment. The exercises of Grace and Courtesy explicitly teach social interaction skills, creating the means for a harmonious classroom culture. The Sensorial, Mathematics and Language curriculum enhance children's abilities to understand the world and to communicate effectively with the people in their community. The Cultural Studies, Science, and Arts materials complete the curriculum by providing a global perspective and an understanding of the world as a unified wh

*Goals*

The goals of the Character and Peace Education Curriculum are to provide children with opportunities to identify and manage emotions and behavior, recognize personal qualities and external supports, recognize the feelings and perspectives of others, recognize individual and group similarities and differences, use communication and social skills to interact effectively with others, prevent and resolve

interpersonal conflicts in constructive ways, apply decision-making skills, and contribute to the well-being of the School and community.

#### *Instructional Strategies & Materials*

- Job Chart: The Primary classrooms have a Job Chart that lists jobs for each child to choose or rotate weekly. The jobs help the children develop specific skills to care for themselves, others, and the environment.
- Birthday Celebrations: Children learn that they travel around the sun once for every year of their life. They participate in a “Sun Ceremony” that has them act out the process of their growing older. A rug/low table is prepared with a yellow sun model with the months around it and a candle acts as the sun. Children hold a small globe and walk around the sun, returning to stand at their birth month, while parent(s) shares important milestones and pictures from each year, as the child continues to walk around the sun.
- Peace Table, Positive Discipline, and Toolbox (described in the early section on “Integrating Social Emotional Learning into Montessori”)

#### Physical Education/Health Overview

Physical Education at the Primary level focuses on care of self, coordination of movement, and cooperation with others.

#### *Goals*

The goal of the Physical Education curriculum is to introduce skills for unstructured play (how to play alone and with others) and develop skills for structured play.

#### *Instructional Strategies & Materials*

Students usually start their physical education time with warm-up exercises followed by one to two group games/activities. Examples of games include kickball, monster ball, relay races. Students exercise their listening and social skills as they follow directions and cooperate with classmates as team members.

## **THE ELEMENTARY MONTESSORI CURRICULUM (SERVING CHILDREN AGES 6-9 AND AGES 9-12)**

### **Elementary Program Overview**

The academic program at Urban Montessori Charter School integrates Montessori methodology, state standards and assessment, arts integration, design thinking and research-based instructional best practices. The result is a highly differentiated learning environment that facilitates accelerated learning and achievement across the curriculum. Our elementary program, like most Montessori elementary programs, is divided into two groups, lower elementary which includes ages 6 to 9 and upper elementary, which includes ages 9 to 12. The curriculum is composed of interwoven subject areas, which are described below. The core academic subjects of mathematics, language, and cultural studies are initially introduced through the Five Great Lessons. Urban Montessori’s curriculum is designed to address the psychological characteristics of children in the second plane of development, which include a stronger capability of effort and concentration, an immense desire for knowledge, a stronger need for intellectual curiosity, development of the powers of imagination and heightened social exploration.

Accountability in this differentiated model is assured through use of Work Plans. Teachers meet with each child to develop a Work Plan (Individualized Learning Plan) for the following week, which includes a checklist of activities the child should complete. These activities are selected based on the child's interest, ability, and age, within the context of the state standards for that grade level. The Work Plans ensure that each child knows which activities s/he is expected to complete. Depending on the child's age, the activity may be teacher checked or self-checked and the recording format varies from a teacher-provided sheet to one that the children create themselves (e.g., journaling). In this way, children develop specific skills in collaboration with their teachers and a classroom environment that is prepared for them. The goal of Urban Montessori Charter School's elementary program is for children to develop themselves as individual beings and to master the process of learning, thereby creating a solid foundation for personal and academic success.

- [Please see Appendix A-10 for a Description of the Core 3-hour Instructional Block](#)
- [Please see Appendix A-11 for a Sample Elementary Work Plan](#)

### Areas of Curriculum

Urban Montessori's Elementary Program includes ten (10) key curricular areas:

- Language Arts
- Mathematics
- History/Social Science
- Cultural Studies and Science
- The Arts (Visual Arts, Music, Drama, Movement)
- Character and Peace Education
- Health and Physical Education
- Practical Life
- Design Thinking
- Technology

The Language Arts and Mathematics curriculum are taught to the mastery level, in alignment with the CCSS. Likewise, History and Social Science is taught to the mastery level in alignment with the CSS in History and Social Science and Cultural Studies and Science are taught to the mastery level in alignment with the NGSS. Of the remaining four curriculum areas, Character and Peace Education and Practical Life come from the Montessori methodology and will be taught in alignment of those objectives. Finally, Design Thinking (from Stanford) and Technology round out the curriculum with the goal to develop creative thinkers, prepared for a future in the 21<sup>st</sup> Century.

- [Please see Appendix A-12 for K-6 English Language Arts standards aligned with Montessori goals](#)
- [Please see Appendix A-13 for K-6 Math standards aligned with Montessori goals](#)

*\*Note – there are no formal Montessori materials or curriculum for grades 7-8; so there is no map of Montessori materials to standards for grades 7-8 provided; grades 7/8 will use Common Core standards*

### Language Arts Overview

Language in the elementary classrooms is connected to all curricular areas and serves as a tool for exploration, communication, and self-expression. Children of this age are interested in exploring beyond the immediate environment and in knowing why things are the way they are. The Montessori

language arts curriculum caters to these characteristics by enabling children to investigate the origin and structure of words and the growth of language in relation to the development of culture. At Urban Montessori Charter School, the language arts curriculum is introduced with the Fourth Great Lesson, “*The History of Language*.”

### *Goals*

The Urban Montessori Language curriculum is aligned to the CCSS in ELA and the California ELD Standards, with specific goals as follows:

- *Read:* By the end of lower elementary, all children will be fluent readers who comprehend grade level text. By the end of upper elementary children are accomplished readers who use reading strategies and skills appropriately according to the genre of the text. They read to access the rest of the curriculum.
- *Write:* By the end of lower elementary, all children will be able to analyze sentences, including parts of speech and grammatical forms and functions. As a result, the nine year old can express their ideas in writing. By the end of upper elementary all children are able to organize their ideas into coherent forms, including persuasive essays, narratives, and other types of creative writing.
- *Communicate:* By the end of lower elementary all children will be able to articulate themselves in speaking and writing using complete and coherent sentences, as well as through presentation. By the end of upper elementary all children will be able to articulate a point of view in speaking and writing in a variety of settings using grade appropriate academic language and Standard English.

### *Instructional Strategies & Materials*

Children are provided manipulative materials in the prepared environment that advance their understanding of the concepts above. These instructional strategies can best be illustrated through examples, as provided below for each area of the Language Arts curriculum.

Content: Instructional strategies for content are illustrated through the Fourth Great Lesson Story. The history of language is the concept at the center of the Fourth Great Lesson story. This story introduces the history of language over time.

- *Fourth Great Lesson story:* Children are invited together to hear an oral retelling of this story. The story is meant to pique their interest and provide the jumping off point for further study. It provides the framework for continued learning, including various stories of how languages developed throughout the world and how that led to the development of different cultures.
- *Language Timeline:* A graphic representation of the history of language provided to children when the Fourth Great Lesson story is introduced and for some time afterwards as a reference and example of how to organize historical thinking.
- *Four part cards:* These are sets of four cards that provide content explanations for children to study. For example, the first card on hieroglyphics would include the title, Hieroglyphics, an illustration of hieroglyphics and a definition, or explanation of the term or concept. The other three cards of the set break up the title, illustration and definition. The cards are mixed up with other card sets and children demonstrate their understanding by matching them correctly and checking to ensure their accuracy. This is a demonstration of the Montessori control of error (self-checking assessment). Once the children complete their checks, they invite the teacher to review their work. To close, and depending on their age, children record their findings in writing.



- Other important tools may include materials like cave drawings, clay tablets and carving tools that further develop the children’s understanding of the history of language. Children may also participate in activities or art projects that demonstrate or illustrate the use of these tools for heightened learning.

Grammar: In Montessori elementary, grammar is systematically and explicitly taught. Multi-sensory instruction includes linking each part of speech with a key experience (a mini lesson), objects (realia), etymology (history of word), and a symbol. This style of presentation assists English Learners in accessing both conversational and academic language. The use of objects, pictures, symbols and linking the root with other languages is interwoven and therefore builds comprehension for students who are not native speakers. Children apply their understanding through use of a compartmentalized wooden grammar box with cards to sort parts of speech. For example, after the key experience and exploration of objects, a child may work with the grammar box to sort and match articles and nouns. Below is an example of how nouns are introduced and explored in the Urban Montessori’s prepared environment:

- *Key Experience with objects:* Children are invited to join a lesson. The teacher dramatically writes the name of an object, hands the label to a child and asks the child to bring the object to the rug. For example, she may hand the child a label, “book,” and the child retrieves a book. She continues with each child, with children placing their objects on the rug next to the label that names it. The teacher states that all of these objects have a name; everything has a name. She continues that names are nouns; a noun is a naming word. This builds on the child’s prior knowledge of objects in the classroom and connects it to a new concept, nouns as parts of speech.
- *Etymology:* Next the teacher gives the etymology of the word “noun.” Children learn that a noun is a naming word deriving from the Latin word *nomen*, which means “to name.” This exploration of the word “noun” connects with their work in the Fourth Great Lesson that words are the building block of language and each has a history.
- *Grammar Symbols:* The symbol for the noun is a large, black pyramid. Pyramids are old, stable foundational structures, as are nouns. Their blackness represents coal, one of the oldest and most common fuel sources.
- *Grammar Boxes:* Children apply their knowledge of the parts of speech to sort and match.
- *Sentence Analysis Charts:* Children diagram the structure of sentences by cutting apart the written sentence itself and by using symbols to represent the parts of speech and the relationship between parts of a sentence. This type of work demonstrates concrete understanding of the concepts that are foundational for coherent writing and speech.

Word Study: Similar to how grammar is taught, word study includes a key experience lesson with objects, an introduction to etymology and application. Word study includes, but is not limited to, the study of compounds, antonyms, synonyms, affixes (prefixes and suffixes), word families, homophones, homonyms and homographs. As above, children are invited to a lesson with the teacher, participate by manipulating objects, learning about etymology, recording (independent practice). The teacher assists with control of error, and collaboration with the teacher allows for checking for understanding and assessment.

Mechanics: This includes capitalization and punctuation and is explored as described above. For example, the lesson on a question mark includes the use of an object to illustrate the concept. In this case, a question is like fishing. You throw out a fishing hook hoping to catch a fish. You ask a question hoping to generate an answer. In this demonstration, the teacher uses a real fishing hook

and line. Conceptual understanding of the purpose of a question mark is reinforced through use of this analogy.

**Reading:** Grade level reading standards are assessed and taught to mastery using running records, the Montessori word work, Fountas and Pinnell Reading Program, and Teachers College Readers Workshop. The state frameworks inform a balanced approach, which includes phonemic awareness, systematic and explicit phonics instruction, the use of leveled reading groups and independent reading to develop fluency, vocabulary, and comprehension. Children learn grade and content specific reading strategies and skills. In addition, children are taught to read for specific purposes: for pleasure or to get information. Specific reading genres are introduced and may include: picture books, fairy tales, legends/myths, folktales, chapter books, reference books, non-fiction, biography, autobiography, etc. Children also learn to read tests as a genre. They receive instruction in learn how to read and understand the format of tests, including how to follow the directions given, how find and interpret key words, and how to respond to different question types. English Language Learners receive additional support in reading instruction, in the form of pull-out groups four days a week.

**Spelling:** Spelling rules are explicitly taught through the Montessori word work and a weekly spelling program. A Words Their Way spelling diagnostic is administered in the beginning of the school year and children receive small group instruction, according to the results of that assessment. Spelling instruction is provided weekly in these small groups and is focused through exploration of that week's spelling rule. Initially, children use the Montessori Movable Alphabet to manipulate the letters to exemplify the rule. They have a list of the words for the week and Command Cards that support their continued learning and reinforce the rule they're studying.

- *Moveable Alphabet:* A visual, tactile, and auditory tool for exploring graphemes and phonemes, while learning rules for spelling. For example, children studying what traditional schools might call "Silent E" would be shown a decorative box, which has a decorative E hiding inside. After building up how magical the E is, the E is revealed, and placed at the end of a three letter short vowel word, such as /c/ + /a/ + /p/. The teacher explains that the E is magical because it changes the short vowel /a/ to Long A. The word *cap* becomes *cape*!
- *Command Cards:* Children have access to a basket full of Command Cards, from which to choose. The Cards provide the children with activities to do to strengthen their spelling skills. The Cards require children to apply their spelling skills and knowledge of spelling rules in multiple ways. For example, a Command Card might ask a child to use two different colored pencils – one color for consonants and one color for the vowels or it might hone in on that week's rule by having children transform words like *cap* into words like *cape* using the Magical E.

**Writing:** Communication using the written form is a central part of the curriculum in traditional and Montessori schools. At Urban Montessori, writing is integrated across subject areas in Montessori with grade level standards introduced and reinforced throughout the lower and upper elementary programs. Grade level writing standards are assessed and taught to mastery. The CCSS in ELA inform a balanced approach to writing instruction, which includes journal writing, creative writing instruction, research, and genre-based writing instruction. This instruction exemplifies all aspects of the traditional school's writing instruction, including: modeled writing, shared writing, guided writing, independent writing, and assessment. Children learn grade and content specific writing strategies and skills through small group and one-on-one instruction.

- *Journal Writing:* Journaling is common to both lower and upper elementary. Children write to record information and their original thoughts, and sometimes write from prompts to generate

ideas about a particular area of focus. This is typically free form writing and each child decides the extent to which the writing is shared or private.

- *Creative & Genre-based Writing Instruction:* Children are provided instruction on a variety of writing genres. These may include, but are not limited to: descriptive, narrative, expository, and persuasive writing. Descriptive and narrative writing are taught and reinforced through journaling and the Teachers College Writers Workshop. This is a systematic and thorough approach to writing instruction that formally begins in the Primary classroom and continues through Middle School. Students are given concentrated time to write each day and cycle through the writing process for a specific genre. They research, collect, draft, revise, edit, and publish narrative and expository text. Students receive direct instruction on a particular skill or concept in a mini-lesson, then are encouraged to practice it in their daily writing. While students are writing, teachers conference or hold small group lessons to differentiate instruction. For the most part, students write independently but also partner or meet in small groups to confer, edit, present and provide feedback to each other to grow their ideas and strengthen their writing. This approach meets children’s developmental needs, while also remaining closely aligned with Common Core standards in ELA.
- *Research & Technology:* Children are provided instruction about how to conduct research and practice appropriate technology use. Most often, this research is guided by the child’s interests, but is linked to age appropriate learning objectives and state standards. For example, the lower elementary child writing about his favorite foods might draw his own pictures, look in magazines to find pictures to cut out, or look on the computer to find pictures to print and cut. Additional information will be of interest to the lower elementary child able to write his ideas, and therefore more research would be done through the use of classroom computers and other reference materials. The upper elementary child conducts research through the use of books and classroom computers. For example, she might do a Web Quest or use other research tools to learn more about obesity rates in the United States, or other related topics. Large sheets of paper are made available for the children to mount their work and children self-publish books about their research to include in the classroom library.

Handwriting: Children are taught to write through the Handwriting Without Tears curriculum which begins with print and then shifts to cursive. They learn about the development of written language through the Fourth Great Lesson, The History of Language, which includes consideration of writing as an art form. Children in upper elementary further their skills by learning calligraphy.

### Mathematics & Geometry Overview

Mathematics in the elementary classroom continues to focus on the use of manipulative materials that lead the 3 to 6 year old child toward abstraction, but differs according to the developmental characteristics of the 6 to 12 year old child. Elementary aged children are socially oriented and enjoy using their ability to reason and to complete large, challenging projects. To cater to these characteristics, the Montessori mathematics curriculum encourages children to collaborate on activities and to derive for themselves the formula, algorithm, or rule necessary for abstractly completing a mathematical procedure. Many exercises allow for the possibility of extensive work while the flexible structure of classroom time enables children to complete large projects and investigations. Curriculum is aligned to the CCSS in mathematics, which fit well within the Montessori methodology. They are sequenced and spiral with complexity as children age and rely on real-world tasks or logical problems to check for student understanding. The standards ask that students place higher focus on the relationships between numbers and operations, as well as be able to analyze patterns and explain their understanding of a concept.

The mathematics curriculum is introduced with the Fifth Great Lesson, *The Story of Numbers*. It is divided into 13 primary areas of work: numeration, multiplication, division, fractions, decimals, squaring and cubing, square root and cube root, powers of numbers, negative numbers, non-decimal bases, word problems, ratio and proportion, and algebra.

The study of geometry forms a separate curricular area in the Montessori methodology. However, geometry concepts are introduced and examined in the same manner as general mathematical ideas and the two curricula are explored concurrently throughout the school year. The study of geometry at Urban Montessori focuses on leading children from a sensorial foundation in two and three-dimensional forms to the discovery of geometrical relationships and abstractions based on their explorations. Geometric exploration begins at the Primary level. Concrete materials (manipulatives) help develop each child's conceptual understanding of the sensorial world, the foundation for geometry, and stimulate mental development by providing experience with logical reasoning, problem solving, deduction, and synthesizing. Geometry at the elementary level can be divided into six areas of work: the study of line, the study of angles, polygons, equivalence, area of plane figures, and solid geometry. Just as children's elementary mathematics work is initiated by a story outlining the history of mathematics, the geometry curriculum at the elementary level also begins with an historical account of the development of geometry. Once a story describing the history of geometry has been presented, work in all other areas of the curriculum can be undertaken.

### Goals

The Urban Montessori mathematics curriculum is aligned to the CCSS in mathematics, with specific goals as follows:

- *Conceptualize (Mathematics)*: By the end of lower elementary, all children understand computations, procedural skills, and problem solving via sequential exposure to manipulatives that develop abstract understanding. By the end of upper elementary, children are skilled at performing mathematical computations, procedural skills, and problem solving abstractly. They maintain strong conceptual understanding through the continued use of manipulatives. By the end of middle school, children are skilled at applying proportional relationships, solving operations with rational numbers as well as familiarity working with expressions and linear equations, working with volume, area, and surface area, and understanding and applying the Pythagorean Theorem.
- *Conceptualize (Geometry)*: By the end of lower elementary, all children further develop abstract understanding of geometric relationships through use of manipulatives. By the end of upper elementary, all children understand geometry abstractly, and are able to use manipulatives to model the concepts. By the end of middle school, all children solve geometric problems abstractly.
- *Compute (Mathematics)*: By the end of lower elementary, all children have developed basic computational and procedural skills to automaticity in: numeration, multiplication, division, fractions, decimals, squaring and cubing. By the end of upper elementary, all children can further compute and perform procedural skills in: powers of numbers, negative numbers, non-decimal bases, ratio and proportion, and algebra. By the end of middle school, all children can further compute and perform procedural skills in: expressions and linear equations, use functions, and apply the Pythagorean Theorem.
- *Compute (Geometry)*: By the end of lower elementary, all children can perform basic geometric computations (e.g., area, perimeter, equivalence). By the end of upper elementary, all children can perform more complex geometric computations (e.g., volume, formulations). By the end of middle school, all children can describe relationships between geometric figures,

understand congruence and similarity using models and software, and solve problems requiring the volume of cylinders, spheres and cones.

- *Solve Problems (Mathematics & Geometry)*: By the end of lower elementary all children can apply their computational and procedural skills to solve word problems. By the end of upper elementary all children will be able to apply skills, understandings, and experiences to resolve challenging mathematical situations. By the end of middle school, all children will be able to apply learned skills to analyze patterns and understand mathematical relationships and resolve complex and multi-step mathematical situations.

*Instructional Strategies & Materials*

Children are provided manipulative materials in the prepared environment that advance their understanding of the above concepts. Again, detail is provided to illustrate the instructional strategies Urban Montessori Charter School will use.

Story of Numbers: The concept at the center of the Fifth Great Lesson story. This story introduces the history of numbers over time.

- *Fifth Great Lesson story*: Children are invited together to hear an oral re-telling of this story. The story is meant to pique their interest and provide the jumping off point for further study. It provides the framework for continued learning, including various stories of how numerals developed throughout the world and how that led to the development of different major systems of counting to fulfill basic human needs. The relevance of mathematics in human society is emphasized in the story and a connection between the study of mathematics and other curricular areas is established. Later presentations on the history of measurement and the history of geometry provide further details in relation to the whole study of numbers and continue the child's exploration of historical mathematics.
- *Math Timeline*: A graphic representation of the history of counting systems provided to children when the Fifth Great Lesson story is introduced and for some time afterwards as a reference and example of how to organize historical thinking.
- *Four part cards*: These are sets of four cards that provide content explanations for children to study. These cards are explained above, in the Language Arts section.

An overview of the kinesthetic materials used within different components of the mathematics program are detailed in **Figure A.7** below.

**Figure A.7 Kinesthetic Mathematics Materials**

Example Concepts	Example Kinesthetic Mathematics Materials
Numeration-introduction to hierarchical numerals	Wooden Hierarchy Material
Multiplication	Large Bead Frame, Checker Board Of Multiplication, Flat Bead Frame, Bank Game, Power of Two Cube
Division	Long Division with Racks and Tubes, Group Division with the Stamp Game
Fractions	Introduction to Quantity, Symbol and Language, Equivalence, Fractions Operations
Decimals	Decimal Fractions, The Decimal Checker Board, Squaring and Cubing Material, and Decimal Stamp Game

### *Geometry Materials*

As described above, geometry at the elementary level is divided into six areas of work: the study of line, the study of angles, polygons, equivalence, area of plane figures, and solid geometry. The first is described in detail below to illustrate the type of instructional strategies and use of materials used at Urban Montessori Charter School. Just as the elementary mathematics work is initiated by a story outlining the history of mathematics, the geometry curriculum at the elementary level also begins with an historical account of the development of geometry. Once a story describing the history of geometry has been presented, work in all other areas of the curriculum can be undertaken. The sequence of geometry presentations will differ according to the interests of each child and not all areas need to be introduced with each student so long as the appropriate state adopted grade level standards are taught.

#### *The Study of Line*

In the study of line children are introduced to the concept and language of lines through the use of concrete materials and various naming activities. No more than three concepts are introduced at a time and terminology is always given in conjunction with a concrete visual impression. For example, to present the idea of a line segment, a piece of string is marked, then cut, in two places to demonstrate that a line segment has two end points. The four areas covered in this section include:

1. Concept of Lines: straight line, ray, line segment
2. Line Position: vertical, horizontal, oblique
3. Positions of Two Straight Lines: parallel, divergent, convergent
4. Intersecting Lines: perpendicular, oblique

#### *The Study of Angles*

The child's study of angles includes eight exercises introducing and exploring the characteristics of angles and a set of activities that sensorially prepare the student for the theorems of angles. The geometric sticks, which consist of colored sticks of different lengths that can be connected through holes at the ends of each stick, are used to demonstrate different kinds of angles and are connected to illustrate the application of angles to the naming and classification of different kinds of triangles, e.g. obtuse, scalene triangle; acute, isosceles triangle. The measurement of angles is introduced through a metal frame, calibrated in 360 degrees, into which fraction pieces can be placed and measured accordingly. Angles can be added and subtracted using the Montessori instrument for measuring angles, and eventually the student can be shown how to use a protractor to measure and draw angles of a particular size. The terminology for interior and exterior space of line is presented using the geometric sticks and a cutting and matching exercise during the sensorial preparation for theorem of angles activities.

#### *Polygons*

The concept and nomenclature of both polygons and circles is explored in the polygon area of the geometry curriculum. In the first activity the terminology of various polygons is presented to the child as each shape is constructed using the geometric stick material. Various exercises are undertaken to acquaint the student with the different forms, including the special names given to quadrilaterals, and a second set of lessons that examines the nomenclature of polygons (side, perimeter, angle, area, vertex, base, altitude, etc.) is presented. A similar presentation is given to introduce the nomenclature of a circle and two additional activities can be initiated to investigate the relationship between a line and a circle, and the relationship between two circles. These activities provide experience in the construction and analysis of plane geometric figures and establish a foundation for the student's later work in area and solid geometry.

### *Equivalence*

In the elementary Montessori classroom the student explores equivalence through three groups of activities. In the first series, equal, similar, and equivalent figures are examined using two sets of divided squares – one containing rectangles and squares of different sizes, the other, triangles. Once the child is able to identify equal and similar figures, equivalence is demonstrated by placing first a rectangular half over a whole square, then a triangular half over the same square and noting that the halves are equivalent because they have the same size despite their different shapes. In the next sequence of activities, the child further explores equivalent figures using the constructive triangle material first introduced in the early childhood class. After experience in this area, equivalence with the Pythagorean theorem is introduced using a set of three metal plates containing insets that demonstrate different applications of the theorem. Work in this area is extended through a number of activities illustrating the theorem with the constructive triangles. The student's experience with equivalence directly prepares her for the study of area and the abstract geometry she will encounter at the middle school and secondary level.

### *Area of Plane Figures*

The area of plane figures, including the circle, is explored through a sequence of activities that move from purely sensorial exercises to those where the formula for determining the area of different geometric forms is derived. In the first set of activities, the child is prepared for finding the area of plane figures through a study of the relationship of lines (base and height) in equivalent figures. Thirteen metal plates containing interchangeable insets are used to demonstrate the equivalence between geometric forms and to help the student discover the rules governing these equivalencies. In the next set of exercises the concept of area of plane figures is introduced through the yellow area material which consists of a collection of movable figures that can be assembled into a parallelogram and three kinds of triangles and then converted into rectangles to demonstrate in concrete form different formulas for calculating area. Further experience with deriving the formulas for area are obtained by analyzing the metal plate material used to show equivalence.

The circle is introduced in the next set of activities. To help the student discover pi, the circumferences of various sized circles from the polygon drawer of the geometry cabinet are recorded each on a separate line. The number of diameters that fit into each circle's line is then counted and the child is helped to see that for every circle, the diameter fits three times and a little more. A second exercise is then given to demonstrate how to find the area of a circle using two circles divided into equal parts that are fit together to resemble a rectangle. By associating the height and base of the rectangle with the radius and circumference of the circle the student is provided with a concrete bases for determining the formula necessary for calculating the area of a circle.

### *Solid Geometry*

The child's exploration of solid figures continues at the 6 to 12 year old level through a study of volume and total area. The formula for calculating the volume of solid figures is arrived at through a series of exercises beginning with ample experience analyzing forms constructed with small cubes. The procedure for computing the volume of a solid prism is investigated in a subsequent lesson and an activity focusing on the equivalence between prisms with different bases is presented to help the student calculate the volume for a variety of prisms. A set of hollow solids that can be filled with sand are then used to help the child discover the formula for finding the volume of a pyramid. The study of volume culminates in an activity where the child is lead to determine the volume formula for the cylinder and cone of the geometric solids. The area of solids is examined by drawing the outline of figures from the geometric solids on large sheets of paper. Once the surface area has been laid out in two dimensional form, the child can apply what she knows about calculating the area of plane figures

to determining the formula for finding the total area of solids. Both series of exercises in the solid geometry area of work enable children to discover the necessary formulas themselves and to apply these formulas to three-dimensional forms found in the environment.

### History/Social Science Overview

At Urban Montessori, History/Social Science will be called social studies. Classroom activities and materials will be drawn from Montessori materials used in geography, history, and anthropology. Because the evolution of human societies is examined as part of the whole unfolding of life on earth, there is much intersection between the science and social studies curricular areas.

For children in the lower elementary program, history and geography are presented from a global perspective, beginning with stories from various cultures about the beginning of the world. Children explore political geography through the use of maps and picture folders. They learn more about how time is measured (daily calendar, the clock, etc.), as preparation for reading timelines of history. Next, children study early human beings, and using the Chart of the Basic Needs and Tendencies, see how all peoples, even from earliest times, have had the same basic needs, and have met these needs through interaction with the physical environment. This connection is made throughout the child's studies – that history is shaped, in part, by geography. The child begins the systematic study of his/her own country, then other countries, through a map series that isolates various physical and cultural features: capitals, borders, rivers, cities, etc.

In the second and third years of lower elementary, the study of early human beings becomes the focus of cultural history, using the prepared timelines and the Chart of the Basic Needs and Tendencies. The Migration Charts are introduced, especially those of early peoples. In Geography, the Classified Nomenclature provides a guide to further exploration of the physical world, parts of the earth, parts of the atmosphere, climate zones, and more specific land and water forms. Whenever possible, the children are taken to natural sites where they can actually observe a marsh, a cliff, etc. When this is not possible, models made of clay and sand are constructed so that the child has the kinesthetic experience of these various configurations. Political geography continues through the use of picture folders, stories, literature, songs, and celebrations from various cultures.

In the first year of upper elementary, the child integrates history and geography, seeing how the particular geographical and biographical features affect the development of a civilization. S/he continues the study of human migrations through the impressionistic charts. The classified history questions offer a more detailed framework for research of a given culture. The child now begins to construct timelines of his/her own, integrating the various skills necessary to execute such a project: collaboration, setting the scale, selection of material, calligraphy, and artwork. When completed by a child or small group, timelines are then presented to the other children in the class. The other dimension that begins at this age is economic geography. Here the child discovers the interdependencies within our economic system. S/he sees we are all interdependent, each giving something to the whole and each taking something. Various systems of exchange are studied, from barter to the use of credit cards.

In the second year of upper elementary, the child continues the study of civilizations, with concentration on the Middle Ages and Renaissance. Instead of working with prepared timelines, the child (usually working with several other children), constructs his/her own timelines, using the Chart of the Basic Needs and Tendencies and the History Questions as guides. In these studies, s/he comes across other forms of human migration, which are crystallized on the Migration Charts. Economic geography expands to include studies of population density and imports and exports.



In the third year of upper elementary, the emphasis in history and geography is on recent and current events – exploring African history, the age of Exploration, and the development of the United States of America. In particular, the child researches and constructs timelines on the history of California and Oakland. S/he makes a study of different political systems and investigates the structure and function of national, state, and local governments. Finally, the child studies the steps in world unification, both economically and ideologically, through an investigation of world trade agreements and peace efforts.

### *Goals*

The Urban Montessori Language curriculum is aligned to the CSS in History and Social Studies, with specific goals as follows:

- Children will develop knowledge and cultural understanding. This includes incorporating lessons from history and the other humanities, geography, and the social sciences.
- Children will develop an understanding of democracy and civic values. This includes an understanding of our national identity, constitutional heritage, civic values, and rights and responsibilities.
- Children will develop skills, which include basic study skills, critical thinking skills, and participation skills that are essential for effective citizenship.
- Children will develop a strong sense of self through the work done exploring other cultures. Students are taught to embrace diversity, use tolerance and empathy when relating to others, and practice peaceful problem-solving to make positive change.

### *Instructional Strategies & Materials*

To achieve the above, children do activities using Montessori materials specific to history and geography. These are listed below. In addition, teachers develop thematic standards-based units for any concepts in the CSS for History/Social Science that are not taught to mastery by the end of the corresponding year. Further, children are provided with opportunities to learn about social studies through primary sources, guest speakers, inquiry-based research projects, and “going out” on field to learn and share.

Activities and materials in the elementary history program include:

- Natural history
  - The Black Strip
  - Clock of the Eras
  - Timeline of Life
- Timeline of Life
- The Linear Measurement of Time
  - The Clock
  - Days of the Week
  - Months of the Year
  - Class Diary
  - History of Children’s Names
  - Personal Timelines
  - The B.C. and A.D. Timeline
- Pre-History
  - The Hand Chart
  - The First Timeline of Human Beings
  - Fundamental Needs Charts
  - Second Timeline of Human Beings

- o History Question Charts
- Written History
  - o The Growth of Culture
  - o Study of Other Civilizations
  - o Study of Child's Own Civilization

Activities and materials in the elementary geography program include:

- Preliminary Exercises
- The Beginning
  - o Great Lesson
- Economic Geography
  - o Production and Consumption
  - o Imports and Exports
  - o Interdependencies
- Nomenclature
  - o Mountains
  - o Rivers
  - o Coastlines
  - o Inland Land Formations
- Experiments

Note that Urban Montessori classifies the study of The Nature of the Elements, Sun and Earth, The Work of Air, and Work of Water as science. In addition to the categories of activities listed above, all grade level state standards for History/Social Studies are taught to mastery.

### Science Overview

No longer content with sensorial experiences, the elementary child's interests extend beyond the immediate environment to the world and include questions of where, when, how, and why. As a result, children study the Earth as a part of its universe and explore the origin of the Earth and the interdependence of plants and animals.

Biology is viewed through a lens of the Earth's creation and explores the needs of plants and animals, ecology, and classification. Lessons are given to small groups of children and incorporate factual information as well as myths and fairy tales. Illustrative charts, demonstrations, and experiments are also used during presentations to make an impression on children and to help them visualize how the world functions. Each child then has the possibility to explore topics of interest on his or her own or may repeat the experiments individually using written instructions referred to as command cards. The command cards help children organize their thoughts clearly and sequentially, and provide them with a format for making up and writing their own experiments. Accurate scientific terminology is used within the presentations in both curriculum areas and, where possible, is linked to its etymology to help children make sense of the language. Nomenclature booklets in the elementary classroom serve as a reference and as a source from which terms that facilitate understanding of scientific concepts can be memorized.

### *Goals*

The Urban Montessori Language curriculum is aligned to the NGSS, with specific goals as follows:

- Children will learn facts, skills, concepts, principles, and theories specified in Next Generation Science Standards.

- Children will learn investigation and experimentation skills essential for inquiry at Urban Montessori Charter School, through high school, and beyond.
- Children will raise questions, follow their curiosity through scientific inquiry, and develop analytical skills in the process.

### *Instructional Strategies & Materials*

At Urban Montessori, the elementary science curriculum can be divided into five broad units of study: the Creation of the Earth, Nature of the Elements, The Sun and Earth, The Work of Air, and The Work of Water. Each unit serves as a follow-up to the story of the earth's creation and will be presented as details set in the framework of the whole rather than as facts to be learned and memorized. The units are closely related and may be presented according to the interests of the children once the story of the earth's formation has been given. In upper elementary and middle school, these units are presented within the categories of Life Science, Earth Science, Physical Science, Investigation, and Technology.

#### Creation of the Earth

The story of the Earth's creation is presented to the entire class early in the school year and serves as the new elementary child's introduction to both the study of science and history. The entire story is given at one seating and can be based on a printed story given to Montessori teachers during their training or developed by the teacher himself. Myths symbolizing facts are used within the story to catch the student's interest, and emphasis is placed on the idea that laws affecting all particles have achieved order within our universe. A number of large, impressionistic charts are displayed during the story to help the child visualize phenomena, such as the relative size of the earth to the sun, and seven different experiments representing basic laws of nature are demonstrated during the presentation. For example, to illustrate that matter settles according to its weight, water, oil, and mercury are poured into a test tube and observed as they form three distinct layers. Books about the solar system and the universe should be made available in the classroom following the presentation, and portions of the story can be retold in more detail if children express an interest in hearing it again. Various follow-up activities, such as swinging a bucket of water over our heads to demonstrate why we don't fall off the earth, can be presented before specific details about the earth are explored more formally.

The unit's remaining lessons examine the composition of the Earth. The Earth's spheres, the concept of gravity, the layers of the Earth, and various pressures influencing the surface of our planet are sequentially explored through the use of charts, demonstrations, and materials allowing children to investigate attributes of our Earth on their own.

#### Nature of the Elements

In this unit, basic principles of nature are explored through factual lessons that use personification and imagery to engage the student's interest and assist her understanding. For example, in one presentation particles are said to be "very stubborn in solids" and "more obliging in liquids" in an attempt to describe the phenomena in terms that the student can relate to. Teacher demonstrations, such as melting wax to illustrate particles becoming loose when heated, are used to illustrate basic laws of nature, and children are encouraged to repeat the experiments themselves using corresponding command cards. The lessons serve as a means for organizing the information and only as much as well will make an impression on the child should be presented at one time. The main topics and subtopics examined in this unit include:

- a. Properties of the Three States of Matter
- b. Further States of Matter

1. Solids: Rigid, Elastic, and Plastic
2. Liquids: Fluid and Viscous
3. Solids Can Have Elasticity
- c. Different Ways of Combining
  1. Solutions
  2. Non-combining Particles
  3. Mixing Particles
  4. Precipitated Reactions
  5. Chemical Reactions
  6. Saturation
- d. Attraction of the Earth and Gravity
  1. Magnetic Pull
  2. Heaviest Particles Settle Towards the Center
  3. Gravity
  4. Heavy Objects Sink

### The Sun and Earth

The Sun and Earth unit explores how the sun influences the earth. The unit consists of four lessons and includes presentations on four different work charts that are manipulated in some manner by the student to reinforce particular concepts introduced during the lessons.

The first lesson, referred to as "The Rotation of the Earth and its Consequences", uses a globe, a lamp, and a number of charts to illustrate how the earth is affected by its own rotation and by its rotation around the sun. The lesson explores why we have night and day, and examines how the earth is heated and cooled in a 24-hour period. Follow-up activities include an introduction to AM and PM and to longitude and latitude.

A second lesson in the unit explores the influence of the sun's perpendicular and oblique rays on the earth. Toothpicks are placed in both a flattened piece of clay and a spherical ball of clay to demonstrate how the curve of our planet's surface causes the sun's rays to fall obliquely on specific areas of the earth. A flashlight is then shone on a piece of paper both perpendicularly and obliquely to show how the perpendicular rays are more intense. The lesson continues by discussing why it is warmer at the equator than at the poles using a variety of charts to illustrate the different explanations.

The next lesson presented in this unit, entitled "The Seasons", explores how the earth's tilt influences the length of our days and the different seasons we have within our year. A story intended to excite the student's curiosity is used to introduce the idea that our days change in length during the year. A clay sphere on a pointer stick is then rotated around a lamp in a tilted position to demonstrate how the sun's perpendicular rays hit the earth at different points during the earth's rotation around the sun causing some areas to get more sun at certain times of the year than other areas. A connection between the length of day and the season is made during the lesson and the student is introduced to the terms solstice and equinox. Follow-up exercises further explore the effects of the planet's tilt through the use of factual charts. Four work charts (a work chart of zones, a time zone chart, a protractor zone chart, and a work chart for the seasons) are introduced at this point to reinforce ideas presented in the seasons lesson.

The last lesson presented in the Sun and Earth unit examines our atmosphere and how rain occurs. Impressionistic charts are used to show how our atmosphere absorbs radiated heat and simple experiments, such as placing a cold lid over a pot of boiling water so that the moisture turns back into

liquid, help the child to understand why it rains. Extensions to this lesson are open-ended and could include a study of cloud formations, precipitation, the geography of deserts, etc.

### The Work of Air

The Work of Air unit focuses on the planet's winds and how these have influenced our earth's climate. The unit begins with a demonstration of three experiments showing that air occupies space, rises when heated, and moves to replace heat that has risen. Six lessons are presented in the unit using a combination of charts, demonstrations, and experiments, and three of the charts introduced are also used as work charts through the addition of a moveable sun and some arrows. Topics and subtopics explored in this unit include:

1. Winds
  - a. Simple Cycle of Winds
  - b. Introduction to Pressure Zones
  - c. Slanted Movement of Winds
  - d. Steady and Variable Winds
2. The Effects of Heat on Land and Water
  - a. Absorption of Heat by Land and Water
  - b. Sea and Land Breezes
3. Seasonal Changes
  - a. Perpendicular Rays of the Sun
  - b. Effects on Wind Directions
  - c. Effects on Rain
4. Local Winds
5. Oceanic Currents
  - a. The Wind's Effect on Currents
  - b. Vertical Motion of Currents
6. Erosion by Wind (or Wind as Sculptor)

### Work of Water

Lessons examining how water in its various forms has helped to shape the surface of our planet are presented within the Work of Water unit. Clay models representing land formations are used in many of the lessons to demonstrate how rivers, rain, and waves have altered the earth's exterior, while both factual and impressionistic charts are used throughout the unit to illustrate the concepts being introduced. Children should be taken to places in nature showing the phenomena introduced when possible, and can follow-up the lessons by building their own models. The unit's topics and subtopics include:

1. The Work of Rivers
  - a. Carving a River
  - b. River Deposits
  - c. Introduction to Highlands and Lowlands
  - d. Rivers of North America
  - e. Rivers of the World
  - f. Introduction to Cities on Rivers
  - g. 'V' Valleys and Canyons
2. Work of Rain
3. Work of Waves
4. Work of Ice
  - a. Breaking Rock Apart

- b. Glaciers
  - c. Results of Glaciers
5. The Cycle of Water
6. Spread of Vegetation
7. People in Different Zones
8. Composition of the Earth

## Biology

The subject of biology in the Montessori classroom is closely related to the child's history and geography work and focuses on the immense variety of ways plants and animals have fulfilled their needs in particular places. Biology is viewed as an essential factor in the story of the earth's creation, and the curriculum's main concern is to foster an appreciation for the diversity of life and to instill an awareness of the importance of preserving the balance of our planet.

At Urban Montessori Charter School, the biology curriculum is divided into four areas (botany, zoology, classification and ecology) and caters to the elementary child's ability to reason and her desire to know the how and why of things. Lessons incorporating allegory and personification are used to arouse the child's curiosity, and charts and experiments are used within the talks to engage the child and to help clarify the information presented. Observations of plants and animals both in the classroom and nature are an important part of the biology work, and relevant books should be made available to children within the classroom. Either botany or zoology can be given first, or both may be explored simultaneously. Classification activities may be started once the child has attained a store of information about the variety of features in plants and animals.

## Botany

The botany portion of the Montessori biology curriculum begins by introducing the primary needs of plants through three experiments. During the first experiment seedlings are placed under different conditions to emphasize that plants need water, light, and heat in order to grow. The second experiment demonstrates that plants have a tendency to grow toward the sunlight, while the third exercise shows that plants need a variety of minerals for optimal health. A chart illustrating the needs of plants can be presented to summarize the experiments and to interest the child in how plants function.

Each part of the plant, which includes the leaves, roots, stem, flower, fruit, and seeds, are then individually explored through a series of lessons incorporating experiments, demonstrations, and charts. The first lesson presented for each part examines the function or contribution that part makes to the plant and frequently uses a story format. Subsequent lessons investigate the plant part in more detail and how different varieties of the part have assisted plants in adapting to their environments.

The main lessons included in this unit are as follows:

1. The Leaf and Its Functions
  - a. Function of Leaves
  - b. Plants Give Out Oxygen
  - c. Parts of Leaves
  - d. Varieties of Leaves
  - e. Varieties According to Function
2. The Root and Its Functions
  - a. Experiments Showing Roots' Attraction to Water
  - b. Roots Absorb Water
  - c. Other Functions of the Root
  - d. Two Main Types of Roots

- e. Other Sensitivities of the Root
- f. Varieties of Roots
3. The Stem and Its Functions
  - a. General Function of Stems
  - b. Two Main Kinds of Stems
  - c. Names of Tubes
  - d. How Water is Moved Up the Stem
  - e. Varieties of Stems
4. The Flower
  - a. Introductory Story to the Flower
  - b. Parts of the Flower
  - c. Varieties of Flowers
  - d. Specialization to Assure Pollination
5. Fruit
  - a. Main Function of Fruits
  - b. Kinds of Fruits
  - c. Parts of Succulent Fruits
  - d. Other Varieties of Fruits
6. Seeds
  - a. Kinds of Seeds
  - b. Function and Parts of Seeds
  - c. Seed Dispersal
  - d. Botany Experiments
  - e. Nomenclature Materials
  - f. Classification Chart
  - g. Classification Material – Kingdom Vegetalia
  - h. Botany books for additional research

Accurate scientific terms are given throughout the presentations and botany card material, consisting of picture, name, and definition cards for botany concepts, can be introduced to help familiarize children with the terms and their definitions. Command cards providing directions for repeating the experiments demonstrated in the presentations can also be made available to children.

## Zoology

The zoology component of the Montessori biology curriculum focuses on the needs of animals and how these needs explain the animal's features and behaviors. Animals kept in the environment help children to become aware of the special needs animals have and provide opportunities for detailed and systematic observations. Two sets of materials, the story material and the body function material, are used in the classroom to help guide the child's explorations and to introduce different ways for classifying animals.

- Story Material

The story material consists of a set of envelopes each dealing with a different animal and containing a picture of the animal, a card of text, picture cards showing how the animal meets her needs and text cards relating to these. Various exercises using the materials are presented to small groups of children to help them become aware that all animals have the same needs but that they satisfy these needs in different ways. Question and answer cards pertaining to how the animal meets her needs, e.g. how do they move? (walk, crawl, swim,

etc.), are then introduced as a simple means for classifying the animals and to start the children thinking about the immense variety of animals that exist.

- **Body Function Material**

The body function material, consisting of booklets, picture cards, and definition cards, are used to synthesize the knowledge the student already has about animals and to introduce the five classes of vertebrate. Various matching exercises provide the child with opportunities for exploring both the external and internal functions, which define a group or class of vertebrate and prepare the child for working with the animal classification material.

### *Classification*

The Montessori plant and animal classification material enables children to develop their analytical abilities by providing them with opportunities to decide whether to place a specimen in one particular group or another. The material, which is composed of picture cards, text cards, and circular cards indicating the level of the subdivision it represents, is organized into envelopes by group with each envelope varying in size in such a way that subdivisions can fit inside of it. Children are introduced to the subdivisions of classification by either working down from each of the kingdoms or by working up to the kingdom beginning with a particular subdivision. Various activities allow children to become familiar with the characteristics for different subgroups and prepare the child for creating a tree of classification which progresses from kingdom to families using the classification circle cards and cardboard branches corresponding to the number of groups being laid out. Children are also shown how to use books to trace a plant or animal's genealogy.

### *Ecology*

The study of ecology in the Montessori elementary classroom focuses on viewing the world as an ecosystem and on the delicate balance existing between organisms and the environment. The idea of interrelatedness is emphasized and is introduced by exploring the physical and biological factors existing in our world and how these factors relate to one another within various ecosystems on our planet. Ecology serves as a natural conclusion to the child's work in many areas of the Montessori curriculum and can be explored in a variety of ways depending on the student's interests.

### The Arts (Visual Arts, Music, Drama, and Creative Movement) Overview

*“The truth is that when a free spirit exists, it has to materialize itself in some form of work, and for this the hands are needed. Everywhere we find traces of men's handiwork, and through these we can catch a glimpse of his spirit and the thoughts of his time.*

*The skill of man's hand is bound up with the development of his mind, and in the light of history we see it connected with the development of civilization.”*

- Dr. Maria Montessori, MD

With the belief that all children have innate creative capacities to be nurtured and shared, Urban Montessori's elementary arts curriculum focuses on building artistic skills in visual arts, music, movement and theater while making larger connections to our history, our culture, our environment, and our unique and shared perspectives of the world. Urban Montessori classrooms have artistic materials at the ready for children to produce creative 'work' emphasizing each child's interests and understanding of The Great Lessons. Additionally, children receive instructional time in the afternoon to synthesize their ideas via visual arts, music and design thinking challenges.



### *Goals*

- Children will build skills in visual arts, music, movement and theater so that they are able to articulate their ideas via a diverse range of visual, musical, kinesthetic or theatrical forms (i.e., drawings, paintings, sculptures, musical scores, dance scores, plays, operas, etc.).
- Children will develop meta-cognitive and reflective skills based on Studio Habits of Mind in order to synthesize their own learning strategies and strengths in both arts and other subjects.
- Children will appreciate different points of view and forms of creative expression across the artistic disciplines in order to empathize with other races, cultures and nationalities as well as take creative action in their own cultural contexts.

### *Instructional Strategies & Materials*

The CA Visual and Performing Arts Framework — artistic perception, creative expression, historical and cultural context, aesthetic valuing and connections/relationships/applications — guides Urban Montessori teachers in their curriculum design and overall integration of the arts into The Great Lessons and Design Thinking curriculum. In addition, Urban Montessori leverages the following frameworks and partnerships to guide the program:

- Harvard Project Zero’s Analytic Lenses help Urban Montessori teachers and children think critically about their creative work. For example, the Studio Thinking Framework’s eight Studio Habits of Mind — develop craft, observe, engage and persist, stretch and explore, express, envision, reflect and understand art world — offer children and teachers a common language to articulate artistic choices and thinking processes. These habits of mind dovetail with the Design Thinking Processes.
- Harvard Project Zero’s Artful Thinking and Making Thinking Visible protocols engage children to reflect upon their artistic work and make their learning visible to parents, peers, teachers and community members. Performances of understanding include: dance performances, plays, art galleries or exhibitions of learning.
- Relationships with key Bay Area arts organizations, namely MOCHA (Museum of Children’s Art), Berkeley Repertory Theater, Shawl Anderson Dance Company, Kala Arts Institute, LUNA Dance Institute, San Francisco Ballet and San Francisco Opera. These arts organizations and others are invited to conduct mini-residencies at Urban Montessori, increasing children’s intensive disciplinary training by professionals in the field.

### Physical Education/Health Overview

At the heart of teaching children about health and physical activity is the need to ensure that children feel included and safe as they learn about health and engage in physical activity. All children will have explicit time scheduled weekly for physical education classes where they will receive training and lessons in numerous physical fitness activities (i.e. martial arts, yoga, soccer, basketball, football, dance, hiking, running, gymnastics) and opportunities to practice their learning in a safe and encouraging setting.

### *Goals*

- Children will appreciate health through study of healthy habits and choices. They consistently apply these skills within and outside the school environment.
- Children will develop skills for unstructured play, including how to have fun playing alone and with others.
- Children will develop skills for structured play, including how to win and lose with grace.

### *Instructional Strategies & Materials*

Students will be provided with lessons as part of the core curriculum that teach specific concepts and skills and provided with opportunities for practice to apply their learning. For example, inside the classroom, children learn about healthy eating habits through daily preparation and service of healthy snacks. This work has a permanent physical place in the prepared environment. Outside, children learn about healthy habits through shared meals, structured, and unstructured play. For example, gardening, hand washing, eating together, washing dishes, composting, playing “chase me,” resolving a conflict, or participating in a dance or yoga class happens regularly. In particular:

- Instruction about healthy habits and choices provides children with the information they need to appreciate health. Urban Montessori provides children with opportunities to develop healthy habits by making healthy choices.
- Unstructured play is time when children get to choose how, where, and with whom they want to play. Here, they develop responsibility for what they’re doing and for each other, while developing independence and leadership skills.
- Structured play includes developmentally appropriate activities bounded by “the rules of the game.” They include competitive activities and skill development about how to keep activities going so the larger group can keep playing when something comes up that stops play. This may include forms of self-handicapping such as switching players or adapting the rules.
- Through exposure to a wide range of physical activities during Physical Education classes, from movement to yoga to swimming to traditional team sports, Urban Montessori children will receive lessons and training in multiple sports and fitness activities to ensure each child connects with a physical activity that s/he enjoys.

### Character and Peace Education Overview

Central to Montessori curriculum is the development of children who are able to function successfully in society. At Urban Montessori, character and peace education is core to the curriculum. Every member of the community is responsible for modeling respect. This includes respect for self, respect for others (including animals), and respect for the environment (at school, at home, and beyond). Many aspects of the School contribute to the development of these mores.

#### *Goals*

- Children will be mindful of their responsibilities as members of the class. This includes respecting themselves and others.
- Children will be able to solve real world problems within the context of their classroom, community, and world.
- Children will be empowered to feel they can and should contribute to their classroom, community, and world.
- Children will work with any child in the class on any project at any time.
- Children will develop empathy with others.
- Children will share their work, inside and outside the classroom.

### *Instructional Strategies & Materials*

A variety of instructional strategies and materials contribute to making Urban Montessori an environment that fosters character and peace education. In addition to Modeling and Peace Table/Corner practices, Peer Teaching becomes an important component at the Lower Elementary Level.

In the Montessori classroom, multi-age groupings make it possible for authentic peer teaching to occur. In traditional classrooms, a teacher may have her third grade children meet with their

kindergarten “Reading Buddies” once a week for 15 minutes. In our classrooms, children of different ages have strong relationships because they’re in the same classroom every day. They learn each other’s strengths and weaknesses, the younger children emulate the older children, and their engagement with one another is purposeful. The children are not required to help another child. They are part of a culture that values helping others. They are self-directed and choose to help each other joyfully, based on real interest and real needs.

Prior to going to the Peace Table/Corner, a child needing help resolving a conflict completes a form, as seen in **Figure A.8**, requesting mediation. The form helps the child prepare for the meeting.

**Figure A.8 Sample Request for Peace Conference**

<b>Peace Conference Request</b>
<p>I _____ am calling _____ for a Peace Conference.</p> <p>I want to meet to discuss _____.</p> <p>I would like a (circle one) teacher or peacemaker to join us.</p>

Once the children are at the Peace Table/Corner, they begin resolving the conflict through use of a Language Frame as seen in **Figure A.9**.

**Figure A.9 Sample I-Message Language Frames**

<b>I-Message Language Frames</b>
<p><i>Child 1 to Child 2:</i> “My name is _____, and I feel _____ when _____ because _____.”</p> <p>(Optional, depending on type of conflict. E.g., physical conflicts are likely to use this, but inclusion/exclusion conflicts are unlikely to) “I want you to _____.”</p> <p><i>Child 2 to Child 1:</i> “So the problem is you feel _____ when _____ and you want _____.”</p> <p>At this point, Child 2 may share additional unresolved feelings, as needed.</p>

As initiated in the Primary classrooms, each Lower Elementary classroom has a Job Chart that lists jobs for each child to choose or rotate weekly. The jobs help the children develop specific skills to care for themselves, others, and the environment.

Other possible opportunities for character and peace education are explained in **Figure A.10**.

**Figure A.10 Peace Education Activities**

Name	Description
Birthdays	Children learn that they travel around the sun once for every year of their life. They participate in a “Sun Ceremony” that has them act out the process of their growing older. A rug/low table is

	prepared with a yellow sun model with the months around it and a candle acts as the sun. Children hold a small globe and walk around the sun, returning to stand at their birth month, while parent(s) shares important milestones and pictures from each year, as the child continues to walk around the sun.
Changemaker Unit	Students spend a few weeks exploring changemakers: people who make peaceful, positive change in the world. Each child then chooses a changemaker to research, completes a report, constructs an artifact, and presents their changemaker to peers. The culminating event is the Changemaker Parade as children represent their changemaker to the entire school.
International Day	Children research their heritage, including where their ancestors came from, where their name comes from, etc. They share about their culture, including geography, food, customs, etc. with their class and schoolmates on International Peace Day.
School Government	Children vote for President, Vice President, Treasurer, and Secretary of the school, as well as class representatives from each classroom. Those running have a platform, give a speech, and share what their plans are to improve the school. Once elected, they hold bi-monthly meetings to fulfill their elected duties.
The Green Team	Children vote for two representatives from each classroom to be part of The Green Team. Their goal is make the school more environmentally friendly.

Practical Life Overview

The primary goal of the practical life activities is to aid the children’s development of self-esteem, concentration, executive functioning and independence. The elementary practical life curriculum is a continuation of the practical life skills presented in the primary classroom. Skills pertaining to care of self, care of environment and living things, along with grace and courtesy are still important. The children are responsible for the care of their classroom. The various responsibilities could include determining classroom guidelines, preparing new materials, printing paper and ordering new dictionaries. However the focus now includes strengthening the ability to cooperate so that the children may become fully capable and responsible adults who develop empathy and sensitivity towards others and who are contributing members of their community.

It is because of this greater sensitivity to others that community service projects are an important part of the elementary practical life curriculum. These projects include the entire school and beyond. "Going out" trips into the wider community are often suggested and planned by the children with a parent or teacher. Such work might include a desire to assist a nation after a natural disaster has occurred. The children’s planning process could include exploring the various channels for providing aid, such as viewing websites for organizations already involved. Children can research the work of the various organizations and think strategically about how they can help. Activities might include notifying the public of humanitarian needs, collecting the supplies and donations, and transporting the goods to the nearest office of the aid organization.

*Goals*

The primary goal is to strengthen the children’s ability to cooperate and to develop a sense of responsibility. The children will develop empathy and sensitivity towards others within their immediate environment and beyond.

### *Instructional Strategies and Materials*

At the Elementary Level, Practical Life moves away from the concrete and to the abstract. Rather than a prepared environment of materials, there is a focus on strategies that support students development of care of self and care of environment indirectly in their day and as a classroom member.

A special kind of field trip called “Going Out” is used to support this at the Elementary Level, which requires children to research and plan trips for their group. For example, “Going Out” for the children researching obesity might involve interviewing medical practitioners and visiting community gardens before completing their writing. The “Going Out” program is an area in development at Urban Montessori.

### Design Thinking Overview

Design Thinking is specifically taught and integrated into the curriculum to nurture a creative disposition in children and provide a skill set that enables them to leverage their content knowledge to identify problems and develop innovative solutions. Through Design Challenges, children are given meaningful opportunities to practice the design process and develop their capacities as designers. These skills support the self-directed nature of the Montessori curriculum and help develop children who are primed both for success in high school and to make meaningful contributions to our 21<sup>st</sup> century society.

### *Goals*

- Children recognize that the objects and systems in their world were designed and built by people
- Children recognize that they can create new solutions to change and improve their world
- Children have a problem solving process they can use to address challenges

As part of this process children learn:

- The phases of the design thinking process
- To play different roles on a design team
- To interview and observe others
- To define problems for which they will develop solutions
- The rules and roles of brainstorming
- To use tools and materials for prototyping
- To test their prototypes
- To present their ideas to others

### *Instructional Strategies & Materials*

Design Thinking Education is an emergent discipline that is being successfully implemented by many schools including our partners at the Henry Ford Learning Institute and Stanford Institute of Design’s K-12 Lab. Urban Montessori continues to develop and implement instructional strategies that leverage the experience of our partners and that appropriately scaffold the design process for children in each of the developmental planes. Since one of the tenets of design thinking is that materials inspire design, our classrooms have a vast array of building materials (recyclables, fabric, wood, glue, etc.) and building tools to encourage broad thinking.

- Both lower and upper elementary children work on Design Challenges to learn the design thinking process
- Both lower and upper elementary children work on Design Challenges tied to the Great Lessons and other curricular content
- Children work on skill building within the prepared environment

- Children work with basic shop tools as well as digital technologies to build their prototypes and share their work

### Technology Program Overview

The Elementary Technology Program begins by developing children’s ability to use technology to bolster their creativity and innovative capacity progressing all the way up to understanding how to use technology effectively to communicate, collaborate and conduct research. Children will find natural intersections between technology and the Schools’ Montessori, Arts and Design Thinking curricula and will leverage modern technology to address the real world problems and opportunities that the founding team believes are central to providing children with context for their learning in the 21<sup>st</sup> century.

#### *Goals*

- Children will demonstrate basic computer fluency, including the ability to use the keyboard and mouse to interact with relevant software and online content
- Children will be able to use technology to write and illustrate short essays, stories and poems
- Children will be able to create basic multimedia artifacts, including simple movies, digital paintings and drawings, slides and other presentation materials
- Children will be able to identify technological opportunities to enhance and demonstrate their learning in any curricular subject
- Children will demonstrate basic internet research skills, including introductory search methodology, data collection and organization and source citation
- Children will engage in basic online collaboration with other children and/or professionals at a distance

#### *Instructional Strategies & Materials*

Urban Montessori will provide children with a range of technology, including computers, Internet connectivity, tablets, mobile devices, input devices and software (including adaptive, media creation, word processing, presentation, spreadsheet and collaboration products).

## **THE SECONDARY MONTESSORI CURRICULUM (SERVING CHILDREN 12-14)**

### **Secondary Program Overview**

Like the elementary program, the secondary curriculum is composed of interwoven subject areas, and in alignment with the third plane of development, the curriculum becomes increasingly multidisciplinary and integrated in its approach and presentation. Urban Montessori Charter School’s Secondary Program includes the all of the key curricular areas named in the Elementary Program:

- Language Arts
- Mathematics
- History/Social Science
- Science
- The Arts
- World Languages
- Character and Peace Education
- Health and Physical Education
- Practical Life
- Design Thinking
- Technology

All grade level state standards in English Language Arts, Mathematics, History/Social Studies, Science, Physical Education/Health, and the Arts are taught to mastery in alignment with the CCSS, NGSS and CSS. It is at the secondary level where Design Challenges and arts integration are increasingly blended into the core curricula and where state standards are presented through multidisciplinary challenges that are meaningful and relevant to our youth.

Dr. Maria Montessori did not specialize in secondary education, but today there are hundreds of Montessori secondary programs nationwide that took her approach to primary and elementary education and mapped it to secondary education. While Montessori did not do extensive research at the secondary level and there are not specific Montessori curriculum materials at this plane of development, she did have several observations about adolescents and their particular plane of development that are in alignment with the understandings of Urban Montessori and current research on adolescents.<sup>13</sup> These observations include:

- Adolescence is a period of great vulnerability
- Adolescence is a period of self-construction; adolescents are trying to make meaning of themselves in the context of larger society
- Adolescents are intellectually prepared to ask and answer hard questions, dive deeper into complex topics, and become motivated by real world issues; simultaneously, they are self-conscious, discouraged easily, and insecure about their ability to do the above
- Adolescents have a great need for creative expression as a means for self-expression and for self-discovery in their pursuit of independence
- Adolescence is a critical time for determining self-worth. In the words of Dr. Maria Montessori, “The whole life of the adolescent should be organized in such a way that it will enable him or her, when the time comes, to make a triumphal entry into social life, not entering it debilitated, isolated, or humiliated, but with head high, sure of himself or herself.”

The Urban Montessori approach to its secondary program follows from the values statements made above and from the best practices of Montessori secondary schools across the country. One example is a nationally recognized public Montessori secondary school located in Cincinnati, Ohio. The first public Montessori secondary school in the country, Clark Montessori serves a socio-economically and racially diverse student population and sends 100% of its seniors to college. Clark organizes its core content around eight central themes. The themes are selected to be relevant to adolescents and their development, to align with state and national standards in Social Studies and Science, and to unify the content in a meaningful way, and Urban Montessori will use similar themes in alignment with the Common Core standards. The themes are as follows:

1. Explorations & New Beginnings
2. Identity
3. Independence & Interdependence
4. Leadership through Stewardship
5. Balance
6. Change
7. Movement
8. Acquiring a Sense of Belonging

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<sup>13</sup> Rathunde, K. (2003). "Comparison of Montessori and Traditional Middle Schools: Motivation, Quality of Experience and Social Context". *The NAMTA Journal*, 28: 12-52.



The Urban Montessori themes will be taught quarterly over eight quarters spanning seventh and eighth grade. Each quarter will culminate in an interdisciplinary Design Challenge that focuses on the theme. Children will receive instruction in all content areas and receive targeted instruction in the state standards throughout the quarter. They will be expected to apply their understanding and learning in complex and relevant challenges that require they employ Design Thinking in the development of solutions. It will be this application of knowledge and skills in real-world Design Challenges that motivates children to obtain the knowledge and skills to begin with. In addition, children in this plane of development will be expected to increasingly manage their learning and to collaborate with classmates around understanding the expectations and the standards, managing their time and their deliverables, and ensuring timelines and performance expectations are met. Teachers will play an increasingly facilitative role in secondary classrooms, focusing on building an individual's skills in accordance with individualized work plans.

- [Please see Appendix A-14 to see Clark Montessori's Theme Integration in Social Studies and Science](#)

Similar to the elementary model, teachers will meet weekly with each child to develop a Work Plan that will include a weeklong schedule of activities and deliverables expected for the week. Depending on the child's needs, the deliverables will be teacher-checked or self-checked and the recording format may vary in alignment with the child's needs. Some students may initially require more of a checklist format, similar to what is used in the elementary program; however, the goal would be to move students towards the secondary work plan format and to move them towards greater independence. The secondary classroom will be completely differentiated with a goal of building every child's capacity to independently monitor his or her own learning, to advocate for his or her own learning, and to leverage the child's peers in his or her learning.

The prepared environment at the secondary level will be designed specific to the needs of adolescents. Secondary children will be organized in "bands", small clusters of children that "travel" together throughout the day. Each cluster will have their own common space set up for quiet study, small group work, research, and larger group meetings and lessons. Secondary children will each have their own personal space in the common room – a mini workstation. In addition, the common room will include comfortable couches, small tables to enable group work, and bookshelves and walls with leveled books and instructional resources. At this age, children will have a greater role in both creating and managing the prepared environment. Each of these bands will have an advisor that will act as their "homeroom" teacher or their primary point of contact, as well as assist them with social, emotional, career and class prep, and academic needs.

In addition to the common spaces for each cluster, there will be classrooms designed specifically to support the secondary curriculum and the secondary instructional strategies. There will be a science lab, a math lab, an art/design studio, and conference rooms for seminars.. Part of the day will be spent in seminar where children are receiving whole-group direct instruction from teachers on specific skills. Part of the day will be spent working independently or in small groups on design challenges in a workshop format. During this time, children will be pulled by teachers as needed for small group instruction, differentiated support, and individual conferencing according to a structured schedule. When children are not working specifically with a teacher either in a conference, lesson, or other structured activity, they are expected to be working in the common room in alignment with their individual work plans.

Once a year, secondary students will engage in a weeklong culminating intersession where they engage in a field study to address a specific design challenge. These field studies will allow the students the opportunity to work deeply on one challenge and have a hands-on experience in a

specific field of study. Ideally, these studies would take place off-site and possibly be part of a multi-day overnight trip, allowing community-building, personal and physical challenges, and a learning experience in another region or culture.

- [Please see Appendix A-15 for a sample Secondary Work Plan, which is called a Planning Guide](#)

The larger goal of the secondary program is to ensure that children are prepared to be successful in any high school and in meeting their postsecondary goals. Teachers at the secondary level will ensure that children are able to utilize textbooks as resources in their learning, conduct effective research and fieldwork, write persuasively and powerfully, organize and collect information from multiple sources and in multiple formats (lectures, text-based, primary, secondary, internet, interviews, numerical data, etc), and be confident and capable presenters. Urban Montessori anticipates its graduates will pursue high schools with diverse offerings and structures, and whether a child chooses a performance-based school for the arts or a more traditional college-preparatory program, Urban Montessori children will have the skills, attitudes, self-confidence, and motivation to excel at the secondary school of their choosing.

### Language Arts Overview

Urban Montessori will use the CCSS in ELA to organize the English Language Arts program. Teachers will determine how to align Urban Montessori's adopted themes with the recommended scope and sequence of the Common Core. In alignment with the CCSS in ELA, Urban Montessori has set the following objectives for the ELA program.

#### *Reading*

Through wide and deep reading of literature and nonfiction of steadily increasing sophistication, children gain:

- A reservoir of literary and cultural knowledge, references, and images;
- The ability to evaluate intricate arguments; and
- The capacity to surmount the challenges posed by complex texts.

#### *Writing*

For children, writing is a key means of asserting and defending claims, showing what they know about a subject, and conveying what they have experienced, imagined, thought, and felt. To be college- and career- ready writers, children must:

- Take task, purpose, and audience into careful consideration, choosing words, information, structures, and formats deliberately;
- Know how to combine elements of different kinds of writing to produce complex and nuanced writing;
- Be able to use technology strategically when creating, refining, and collaborating on writing;
- Become adept at gathering information, evaluating sources, and citing material accurately;
- Report findings from their research and analysis of sources in a clear and cogent manner;
- Have the flexibility, concentration, and fluency to produce high-quality first-draft text under a tight deadline; and
- Have the capacity to revisit and make improvements to a piece of writing over multiple drafts when circumstances encourage or require it.

### *Speaking*

To become college and career ready, children must have ample opportunities to take part in a variety of rich, structured conversations – as part of a whole class, in small groups, and with a partner – built around important content in various domains. They must be able to

- Contribute appropriately to these conversations;
- Make comparisons and contrasts
- Analyze and synthesize a multitude of ideas in accordance with the standards of evidence appropriate to a particular discipline;
- Be able to listen attentively to others so that they are able to build on others' meritorious ideas while expressing their own clearly and persuasively.
- Present their work to both small and large groups in multiple formats confidently, effectively and with accuracy.

### *Language*

To be college and career ready in language, children must:

- Have firm control over the conventions of standard English;
- Be able to choose words, syntax, and punctuation to express themselves and achieve particular functions and rhetorical effects;
- Have extensive vocabularies, built through reading and study, enabling them to comprehend complex texts and engage in purposeful writing about and conversations around content;
- Become skilled in determining or clarifying the meaning of words and phrases they encounter, choosing flexibly from an array of strategies to aid them;
- Learn to see an individual word as part of a network of other words—words, for example, that have similar denotations but different connotations.

### *Instructional Strategies & Materials*

Children in Middle School will continue to work from the Teachers College Readers and Writers Curriculum. Students at this level will access primary and secondary sources to seek information and present their written and spoken understanding and analysis in multiple ways as appropriate for the audience. Children will have increased access to the resources available outside the classroom and will be taught how to differentiate and evaluate information and the sources from which the information comes. They will access multiple forms of information with an inquiry orientation, questioning the motives, intentions, and biases of the presenters and the context from which the information is being presented. Children will be expected to read and respond to classical literature, analyze and understand poetry, and be versed in the strategies for accessing and understanding nonfiction text. In alignment with the third plane of development, the secondary language arts curriculum will be integrated with the other disciplines. Lessons on accessing expository text will utilize science, history texts and timelines the children are already using. Lessons on poetry will align with cultural studies.

Children will increasingly leverage the world outside the classroom to get information and better understand multiple perspectives, increasingly doing fieldwork and interacting with community resources in Oakland. Technology will play an increasing role in both the acquisition of information and the presentation of learning. As they advance at the secondary level they will use technological tools with greater frequency and will be explicitly taught how to assess the value of different sources as they conduct research. They will also be expected to integrate video, design, digital art, and other media tools in their presentations of learning.

The general format for the school day will be a workshop format where children are expected to work on both group and individual assignments, peer conference with other children, or work in small groups on assignments or projects while the teachers are leading mini-lessons or working with individuals on targeted tutorials. There will be whole-group mini-lessons given throughout the week to ensure children receive explicit skills instruction in reading, writing, note-taking and presentation strategies in alignment with the Common Core standards. In addition, children will be pulled together during language arts time to respond to text using reciprocal teaching strategies, literature circles, and Socratic Seminars. Children will be explicitly taught to use note taking, processing, analysis, and planning tools to build their ability to organize their thinking and collect information in a useful format. As needed, children will receive targeted accelerated instruction in reading and writing strategies utilizing proven reading and writing interventions curriculum.

- [Please see Appendix A-16 for the Urban Montessori Secondary ELA Plan](#)

### Mathematics Overview

UMCS will use the Common Core State Standards (CCSS) adopted by the in mathematics to organize our Mathematics program. Because Montessori is at its foundation differentiated, teachers will develop individual learning plans in alignment with their zones of proximal development in mathematics. Based on diagnostic assessments, children will be grouped to receive strategic instruction in their ZPD. This could mean that some children are receiving instruction in Basic Concepts, Algebra I or II, Geometry, or even Trigonometry if they are ready and have demonstrated mastery in prerequisite content and concepts. Following the progression of the standards and in-line with Montessori methodology, students will receive instruction through real-world problems for conceptual understanding, then will transition to practice in abstract form to support mastery.

#### *Goals*

Students will receive instruction in their zone of proximal development and follow curriculum in-line with the CCSS in mathematics. Some students will advance to Algebra if they exhibit exceptional math skills and practice. They will demonstrate the following habits of Algebraic thinking:

- Doing – Undoing: Effective algebraic thinking sometimes involves reversibility
- Building Rules to Represent Functions: Input is related to output by well-defined rules
- Abstracting from Computation: Abstracting system regularities from computation<sup>14</sup>

Students will possess utility with algebraic language and constructs when presented with non-routine problems and approaches. They will demonstrate conceptual understanding, procedural fluency, strategic competence, adaptive reasoning, and productive disposition in:

- Problem Solving and Variable
- Equality and Algebraic Representation
- Linear and Non-Linear Functions
- Polynomial Functions
- Slope and Graphical Representation
- Polynomials (Multiplication and Factoring)
- Rate of Change and Technology

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<sup>14</sup> Fostering Algebraic Thinking, Driscoll, 1999, Educational Development Center, Heinemann

### *Instructional Strategies & Materials*

Similar to language arts, children will predominantly work in a workshop model where they are working independently or in small groups. Teachers in this model will be working with small groups of children or individuals on targeted lessons conscious that many children struggle to grasp mathematical concepts in the same form and that differentiation and scaffolding may be required for specific learners to master standards. Teachers will be tracking and monitoring student understanding and mastery of standards daily to monitor which lessons are strategic for which children, which children require more guided practice in small groups, or which children need re-teaching one-to-one or in small groups. Children with IEP's or that are in need of more academic support, may require more practice or interventions provided by our Special Education Support Team. Children will work on mastery of specific skills and standards in alignment with their individualized work plans developed on a weekly basis.

The materials used in the lessons and in the prepared environment will be strategically selected to support conceptual understanding. Children will be encouraged to make connections and push their understanding by accessing additional resources both in and outside of the classroom. For example, when children are exploring slope, they will be able to access multiple manipulative materials in the classroom that demonstrate slope and push their thinking about slope, but they will also be able to access engineers and road designs to understand why in going over a mountain engineers choose to use switchbacks instead of a very steep road. Technology will increasingly be used to demonstrate concepts in the classroom and to enable children to work at their own level and pace. New “adaptive” teaching programs are rapidly emerging that enable children to do independent practice of skills learned in their zone of proximal development. Urban Montessori will continue to explore these types of programs, to support our ability in providing targeted instruction to both the motivated child ready to accelerate in mathematics as well as the struggling student requiring additional practice and support.

To organize and sequence the learning appropriately and to provide appropriate resources and content-specific professional learning opportunities, Urban Montessori will utilize programs such as Connected Math that align closely to the UMCS philosophies around effective mathematics instruction. Specifically, Urban Montessori is committed to implementing a secondary math program in alignment with Connected Math where:

- The "big" or key mathematical ideas around which the curriculum is built are identified.
- The underlying concepts, skills, or procedures supporting the development of a key idea are identified and included in an appropriate development sequence.
- The curriculum has coherence - it builds and connects from investigation to investigation, unit-to-unit, and grade-to-grade.
- Classroom instruction focuses on inquiry and investigation of mathematical ideas embedded in rich problem situations.
- Mathematical tasks for students in class and in homework are the primary vehicle for student engagement with the mathematical concepts to be learned. The key mathematical goals are elaborated, exemplified, and connected through the problems in an investigation.
- Ideas are explored through these tasks in the depth necessary to allow students to make sense of them. Superficial treatment of an idea produces shallow and short-lived understanding and does not support making connections among ideas.
- The curriculum helps students grow in their ability to reason effectively with information represented in graphic, numeric, symbolic, and verbal forms and to move flexibly among these representations.
- The curriculum reflects the information- processing capabilities of calculators and computers and the fundamental changes such tools are making in the way people learn mathematics and

apply their knowledge of problem-solving tasks.

Once children have demonstrated understanding of a given mathematical lesson and are able to apply their learning at the higher ends of Bloom's taxonomy (synthesize, apply, analyze, and create), teachers will create open-ended multidisciplinary Design Challenges for children to apply their learning to solve relevant and real problems, deepen their understanding and to integrate their learning from the other disciplines. Design Challenges will be facilitated in workshops where some children collaboratively engage with the challenges while the teacher is conducting targeted lessons with other small groups or individuals.

- [Please see Appendix A-17 for Urban Montessori Secondary Math Program](#)

### History/Social Studies Overview

Social Studies at the secondary level will be taught in alignment with the California State Standards. Because our classrooms will be multi-age with 7<sup>th</sup> and 8<sup>th</sup> graders combined, teachers at the secondary level will build upon the Great Lessons at the elementary level and teach World and United States history in the context of the overall advance of human civilization. Instead of separating World and United States history, the World and United States history standards will be integrated so children can build better awareness of how the United States and the rest of the world advanced, related, and interacted over time.

#### *Goals*

- Children will have knowledge of the pivotal historical events that took place in World and United States history from medieval times through World War I.
- Children will be able to explain how major events are related to one another in time, construct various timelines of key events, people, and periods of the historical era they are studying, use a variety of maps and documents to identify physical and cultural features of neighborhoods, cities, states, and countries and to explain the historical migration of people, expansion and disintegration of empires, and the growth of economic systems.
- Children will be able to frame questions that can be answered by historical study and research; distinguish fact from opinion in historical narratives and stories; distinguish relevant from irrelevant information and essential from incidental information; and assess the credibility of primary and secondary sources and draw sound conclusions from them.
- Children will be able to detect the different historical points of view on historical events and determine the context in which the historical statements were made; understand and distinguish cause, effect, sequence, and correlation in historical events; explain the sources of historical continuity and how the combination of ideas and events explains the emergence of new patterns; recognize the role of chance, oversight, and error in history; and recognize that interpretations of history are subject to change as new information is uncovered.

#### *Instructional Strategies & Materials*

The Social Studies units will align with the following themes to ensure there is cohesion across the curriculum.

- Explorations & New Beginnings
- Identity
- Independence & Interdependence
- Leadership through Stewardship
- Balance

- Change
- Movement
- Acquiring a Sense of Belonging

Children are provided with opportunities to learn about history/social studies through primary sources (international pen pals, interviews of elders, autobiographies), secondary sources, inquiry-based research projects, and fieldwork. Because so much of history is based on interpretation, all units of history will be taught using diverse sources. The prepared environment becomes the perfect means by which to deliver a rich history lesson conducted through self-guided exploration, as a classroom can be arranged to present multiple perspectives, different media, and various sources on the same historical event. The teacher can then support children as they begin to understand the events that occurred through multiple voices and lenses and inevitably begin to ask questions about the accuracy of the sources, the biases imbedded, the means by which to seek “truth”, and the importance of understanding ALL the perspectives and voices. Again, history will primarily be taught in a workshop model where children are working on multidisciplinary inquiries and Design Challenges in small groups while the teacher is doing direct targeted instruction in research skills, geography skills, analysis skills, and text-based language arts skills. Because so much of history is accessing, processing, and integrating information often found through text and because presentation of understanding and analysis will almost always have a verbal component, history will generally be integrated with language arts. The historical content will be taught as stand-alone lessons and units, but whenever possible, they will be integrated with science, math, art, music and peace education so children understand that all disciplines have a rich history that has informed our society and values today.

### Science Overview

The secondary curriculum will build upon the elementary focus on Earth, the origin of the Earth and the interdependence of plants and animals by going deeper into life sciences and then moving into physical science. Children will have the opportunity to build connections that link science to technology and societal impacts. As science, technology, and societal issues are strongly connected to community health, population, natural resources, environmental quality, natural and human-induced hazards, and other global challenges, children will begin building the foundation for understanding these issues.

### *Goals*

- Children have basic understanding of life science (cell biology, genetics, evolution, the human body, and the principles of chemistry underlying biological functions) and physical science (motion, forces, structure of matter, and density and buoyancy).
- Children are able to select and use appropriate tools and technology to perform tests, collect data, and display data.
- Children are able to design and conduct a scientific investigation based on a question they produce and follow the scientific method – develop a hypothesis; design an experiment; distinguish between variable and controlled parameters in a test; construct appropriate graphs from data and develop quantitative statements about the relationships between variables; evaluate the accuracy and reproducibility of data; present a conclusion with comprehensive evidence.

### *Instructional Strategies & Materials*

As with Social Studies, Science units will also align with the following themes to ensure there is cohesion across the curriculum.



- Explorations & New Beginnings
- Identity
- Independence & Interdependence
- Leadership through Stewardship
- Balance
- Change
- Movement
- Acquiring a Sense of Belonging

Children will be provided with opportunities to learn about science content through primary sources, secondary sources, inquiry-based research projects, hands-on materials, and fieldwork. The prepared environment again becomes the perfect means by which to deliver a rich science lesson conducted through self-guided exploration, as the classroom can be arranged to enable children to explore a scientific idea before they study it. The teacher can then support children as they begin to understand the motion or force or cell biology through exploration that generates questions and curiosity. Like history, science will primarily be taught in a workshop model where children are working on multidisciplinary inquiries and Design Challenges in small groups while the teacher is doing direct targeted instruction in research skills, analysis skills, science content, integrated math skills, and text-based language arts skills. The science content will be taught as stand-alone lessons and units, but whenever possible, it will be integrated with language arts, history, math, art, music and peace education so children understand that science concepts and content flows across all disciplines and is foundational for understanding the interdependency of all things in our lives.

### World Language

Urban Montessori will provide world language instruction formally in 7th and 8th grade, through the study of Spanish.

#### *Goals*

- Children are able to communicate orally in a world language with a beginning level of fluency and are able to use that language to communicate in settings outside of the classroom.
- Children gain knowledge and understanding of another world culture and understand the role language plays in cultural identity.
- Children develop an understanding of the nature of language and are able to compare and contrast the language they are learning with their native language

#### *Instructional Strategies and Materials*

Urban Montessori provides world language instruction very similarly to the way the School teaches English Language Development to English Language Learners. Children receive a balance of content-based language instruction and content-independent language instruction. The content will enable children to make meaningful connections, build vocabulary and context, and learn about language as it relates to culture. The content-independent language instruction will provide the rules of the language and work in concert with the content to build confidence in the language and provide context for the grammar and rules. In alignment with the Montessori approach, children will gain access to much of the content, vocabulary, cultural exploration, and connections through a prepared environment.

The Montessori setting naturally provides many of the graphic supports and visuals fundamental to content-based language instruction. The teachers will embed procedural, verbal, and instructional



scaffolds into the prepared environment to enable them to access the language naturally, and they will create explicit opportunities for children to engage in conversation and discussion as part of the daily routine. This is also where the School will reach out to our families and our community to bring native speakers to the classroom whenever possible to authentically engage our children in the world language.

### The Arts (Visual Arts, Music, Drama, Creative Movement) Overview

Building on the elementary arts program, Urban Montessori young adolescents move into a more group-oriented focus where group projects require 21<sup>st</sup> century learning skills of leadership, collaboration and communication. They work increasingly more independently in the art studio, expressing individual points-of-view via art materials, while more fully participating in group-inspired artistic projects like community murals, public art installations, plays, dance performances, gallery exhibitions or film/videos.

#### *Goals*

- Children will master skills in visual arts, music, movement and theater so that they are able to articulate their ideas via a diverse range of visual, musical, kinesthetic or theatrical forms (i.e., drawings, paintings, sculptures, musical scores, dance scores, plays, operas, etc.).
- Children will further develop meta-cognitive and reflective skills based on Studio Habits of Mind in order to synthesize their own learning strategies and strengths in both arts and other subjects, propelling them to a successful high school experience.
- Children will appreciate different points of view and forms of creative expression across the artistic disciplines in order to empathize with other races, cultures and nationalities as well as take creative action in their own cultural contexts
- Children will participate in group-oriented projects that positively affect the community at-large and instill 21<sup>st</sup>-century learning skills of leadership, collaboration and communication. Children will develop a portfolio of artworks for high school applications, including drawings, paintings, photographs of sculptures or installations, murals, music recordings, collaborative performances, murals, etc. and be able to articulate their thinking behind the chosen works.

#### *Instructional Strategies & Materials*

Similar to elementary school, the CA Visual and Performing Arts Framework guides Urban Montessori's secondary school teachers in their curriculum design. In addition to fine art, teachers focus on media literacy — how to deconstruct advertising, propaganda, fiction, reality TV, etc. and tell persuasive stories so that children learn to function critically in a media-saturated society. Film, video and digital photography are introduced at the secondary level. In addition, Urban Montessori leverages the following frameworks and partnerships to guide the program:

- Project Zero's Studio Thinking Framework's eight Studio Habits of Mind are part of every secondary child's individualized learning plan and process portfolio reflection log, showing growth over time.
- Project Zero's Artful Thinking and Making Thinking Visible protocols are led by secondary children, who model creative confidence and make their learning visible to parents, peers, teachers and community members.
- Mini-residencies with Bay Area Arts and media organizations provide secondary children with opportunities to further their disciplinary knowledge, propelling them to create a solid, well-rounded high school portfolio.
- Field trips to various artistic exhibitions of modern and contemporary art, museums, theater, street theater, music concerts, dance performances, plus film festivals are part of the

secondary experience, fostering inspiration and increased understanding of the art world and all of its proponents.

### Physical Education/Health Overview

Very similar to the elementary physical education program, the secondary school physical education program is focused on the development of healthy minds and bodies. Because adolescents have so many changes taking place in their bodies, there will be ongoing space and time to discuss and better understand those changes. A significant component of the physical education program will be developing increasing understanding of the role of exercise and nutrition on physical and mental wellness and building healthy habits in our tweens. Urban Montessori will also explicitly design physical challenges that authentically teach important life skills like persistence, practice, teamwork, sportsmanship, self-awareness and reflection, and self-discipline.

#### *Goals*

- Children will gain deeper awareness of the interconnectedness of mind and body, and as they develop into adolescents, they will develop positive body images.
- Children will be able to identify at least two physical activities that they enjoy
- Children will demonstrate age-appropriate ability around and see the value in persistence, practice, teamwork, sportsmanship, self-awareness and reflection, and self-discipline.

#### *Instructional Strategies & Materials*

At the secondary level, physical education will be divided into three general areas – the relationship between nutrition, fitness and health; general body awareness; and physical and recreational activities that integrate environmental education and responsibility. The first two areas will be addressed through integration with the science curriculum as well as through team time. Nutrition education and body awareness will regularly be integrated into science education, and Design Challenges will be presented that push children to make those connections. Nutrition education will also tie to the gardening program and the responsibility of children in the involvement of the snack and school lunch program. Since school lunches are often critiqued by teens, Urban Montessori will involve secondary classroom leaders in the decision-making around the school lunch program and seek a partnership with a lunch provider who is excited about the implementation of this learning component. Urban Montessori will seek or develop curricula that support adolescents in developing positive body images and self-awareness around the changes in their bodies that will be implemented during class and team time. Children will be separated by gender as needed so they can share openly about the physical and emotional changes taking place during this turbulent time.

The third area of physical education will be facilitated through guided independent study. The elementary program exposes children to the many recreational and physical activities available in the Bay Area. At the secondary level, children will be able to select specific activities they want to learn more deeply. Children will develop individualized physical education plans that document how they are meeting the physical education standards. Physical education activities will also be recorded in student work plans. Children will be required to provide a log and a written report on their physical education activities to ensure they are completing the requirements. On site, Urban Montessori will assess students regularly in specific fitness activities in alignment with the Presidents' Physical Fitness Test. Any child who is struggling to meet the physical education requirements independently will be provided a more structured physical education program where his or her activities are dictated and monitored.

## Character and Peace Education Overview

Very similar to the elementary curriculum, character and peace education is also core to the secondary program. Ultimately, character and peace education is integrated thoughtfully into all disciplines in the secondary program through the eight themes. The skills required by the Montessori work plans and the many opportunities to collaborate as part of a team authentically build children's self-esteem, independence, responsibility, compassion, openness to new experience and learning, patience and self-discipline, acceptance of others, and effective and satisfying social relationships.

### *Goals*

- Children will be mindful of their own learning and their own behavior. They will demonstrate self-awareness and self-discipline in their work and be able to identify and problem solve challenges as they arise.
- Children will be able to solve real world problems within the context of their classroom, community, and world; they will be able to articulate the value of the work they are doing.
- Children will feel self-confident in their ability to make a difference and be self-aware of the role they can play to positively impact their group, their class, their community, and their world.
- Children will demonstrate self-awareness and self-discipline in working collaboratively. They will take responsibility for leading and facilitating the group's progress and learning and will understand interdependency and the power and value of the collective.
- Children will be able to resolve conflicts by listening to others' perspectives, sharing their perspective respectfully, and facilitating collective understanding; all children will be able to understand and value the perspectives and experiences of others in different contexts, from different cultures, and with different opinions
- Children will be able to share their perspectives and opinion respectfully and present their understanding and their thinking in a clear and persuasive manner

### *Instructional Strategies & Materials*

The secondary program focuses on supporting adolescents to build a strong sense of identity and a greater awareness of themselves in the context of their world. "In the transition from childhood to adolescence, individuals begin to develop more abstract characterizations of themselves, and self-concepts become more differentiated and better organized. Adolescents begin to view themselves in terms of personal beliefs and standards, and less in terms of social comparisons (Harter 1998)." True mastery of the goals stated above requires a foundation of self-confidence, self-discipline and self-awareness. As stated above, character and peace education at the secondary level will be intentionally integrated across all the disciplines. To support children in developing this foundation, the Schools will utilize instructional strategies that promote discussion (Socratic Seminar, literature circles), that encourage debate, that push peer teaching (reciprocal teaching, collaborative inquiries), and encourage mindfulness (journal and letter writing, reflections, art, music, meditation). Design Challenges and lessons will be developed to encourage children to explore their own histories, cultures, values, and dreams so they can make meaningful connections to the history or science they are learning. All units and lessons will be developed to encourage connections, build curiosity, and push critical thinking and aligned along eight critical themes. Urban Montessori will ensure that every child at the secondary level has an adult ally to whom the child feels connected and safe, and children will be supported to find their own solutions to conflicts with peers, families, or with staff. The teachers for the secondary program will serve as mentors and facilitate the process as their children learn how to observe, listen, read critically, gather information, and learn from hands-on experience.

When children run into obstacles and identify challenges in completing their work, managing their time, managing themselves, or working with others, teachers will support students by coaching them, being a thought partner, asking meaningful questions, mediating issues in a group, providing

feedback, and providing tools and strategies. That the challenges arise out of authentic tasks will enable children to learn these lessons in context, making the learning that much more meaningful.

### Practical Life Overview

Practical Life activities encourage the development of independence and foster each child's adaptation to the social context of their environment. At the secondary level, practical life activities return to care of self, care of the environment, and exercises of grace and courtesy though at a level relevant to adolescent development. At this age, care of self is about understanding what is happening with their bodies, being able to act with increasing independence in managing their lives, and developing a more personalized understanding of how to care for themselves. Care of environment extends past immediate environment to the larger community and global environment. At this age, we push children to better understand how their day-to-day actions have impact on the globe and on other people. Grace and courtesy at this age is about self-awareness, empathy, and self-confidence.

#### *Goals*

- Children understand how their actions and behavior impact others both in their immediate environment as well as a larger global context
- Children are able to manage their time, others' expectations of them, and their work – prioritize, sequence, and request help as needed
- Children are able to go into foreign contexts, have the confidence to engage and interact, and develop positive relationships across cultures, languages, generations, and contexts.

#### *Instructional Strategies & Materials*

In the individualized Montessori setting, practical life goals and activities will be personalized to each child's level of functioning. Children will be facilitated in self-reflection to identify strengths and areas of growth. They will outline specific goals for themselves and then receive targeted instruction and monitoring in the achievement of those goals. For example, if a child identifies organization as a challenge, the teacher and that child would work together to develop a plan to develop better organizational skills, with scaffolding and specific lessons around how to be better organized in alignment with this plan. The idea that everything that we do has impact on someone else would be a constant and ongoing theme across all the disciplines and an explicit guiding question in all of the Design Challenges presented.

### Design Thinking Overview

Design thinking at the secondary level will be a natural extension of the program at the elementary level. Children already steeped in the design process, equipped with prototyping skills and viewing themselves as designers will take on projects of longer duration and with more profound real world impact than they experienced at the elementary level.

#### *Goals*

- Children understand that the design process can be applied to a wide range of problems and they regularly leverage this process
- Children perform 'need finding' to uncover opportunities to change and improve their world
- Children engage in solving problems that meaningfully impact themselves and their community and gain presentation and implementation skills to defend their ideas in a public forum and see their visions become reality
- Children view themselves as designers and develop additional techniques as they develop key design thinking mindsets

- Mindful of process
- Ready to collaborate
- Empathy for others
- Bias to action
- Prototype everything

### *Instructional Strategies & Materials*

At the secondary level, design skills will be reinforced and bolstered via special Stop, Drop and Design days with most of the projects fully integrated as an extension of the regular curriculum. Children will have tools and materials available to create high fidelity prototypes of their designs, leveraging principles of construction and engineering to truly test their ideas in the world.

- Design Challenges will be created so children can work on real world problems of relevance to their lives and community
- Graduating children will work on a capstone design project

### Technology Overview

The secondary technology program builds upon the foundation established in the elementary program. At the secondary level, children extend their skills to create more sophisticated, creative and innovative artifacts through the use of technology, advance their ability to gather and evaluate online content related to their learning, develop an understanding of what it means to be a digital citizen and understand technology operations and concepts related to how the hardware and software they use functions.

### *Goals:*

- Children will demonstrate proficiency with presentation, word processing and spreadsheet applications
- Children will demonstrate proficiency in at least one media creation application, such as *Photoshop, Illustrator, or Final Cut Pro* and will be able to integrate the appropriate use of original media into demonstrations of mastery for any curricular subject
- Children will demonstrate proficiency in using a variety of digital media to locate, organize, analyze and evaluate information from a variety of sources
- Children will understand how to engage safely and respectfully in online research, collaboration and networking
- Children will demonstrate at least a basic understanding of key computer components, internet infrastructure and application development principles
- Children will demonstrate at least an introductory level of mastery in one coding language.

### *Instructional Strategies & Materials:*

- Urban Montessori will provide children with a range of technology, including computers, curated Internet connectivity, tablets, mobile devices, input devices and software.
- We use Google Apps for Education's rich collection of authoring and collaboration tools for media creation, word processing, presentation, and spreadsheets.
- MIT's Scratch is available for making animations and interactive games by creating scripts in a visual programming language.
- We are using a range of Autodesk products including Pixlr Editor for digital art, TinkerCAD and the 123D Line for 3d modeling.
- We also offer "brain games," a curated selection of self-paced games with a foundation in

mathematics, writing, and coding from companies such as BrainQuake, IXL, Glass Labs Games, Motion Math, and Khan Academy. Research skills using Google and Wikipedia are practiced in group sessions of the Carmen Sandiego game series.

## INSTRUCTIONAL PLANNING

At Urban Montessori, instructional planning is organized into five steps: preparation of the prepared environment, long-term plan development, unit plan development, weekly lessons and weekly work plans. Taken together, these five steps bring together Montessori’s effective child-centered approach with instructional plans that align programmatic and state standards seen at high-performing district and charter public schools across the state. **Figure A.11** provides further detail on the steps and corresponding goals of instructional planning at Urban Montessori.

**Figure A.11 Instructional Planning**

Instructional Planning at Urban Montessori Charter School	
Steps	Goals
1. Preparation of the prepared environment	Coordination of space, people, time, as well as the selection of activities and materials. The environment should provide full opportunities for individual development within the classroom.
2. Long-term plan development	Mapping of grade level state standards in ELA, Math, Science, and History/Social Science onto a school year calendar.
3. Unit plan development	Designing thematic and standards-based units that integrate content across the curriculum.
4. Weekly lesson plans	Listing of presentations (or lessons) from the teacher(s) to each child for the week. These lessons are in the child’s zone of proximal development, or ZPD.
5. Weekly work plans or journals	Empower children to document what they are working on in between conferences with teachers.

### Preparation of the Prepared Environment

Montessori emphasizes careful preparation of environments that respond to the specific needs and tendencies of children at each stage of development. The prepared environment is wholly geared to maximize children’s independent learning and exploration. Given individualized learning plans (discussed below), children may choose what they want to work on, with whom they would like to work, and where they would like to work, and may do so at their own pace as teachers observe and guide them to master learning goals. The environment, which includes both the physical space and the multi-age class groupings, directly shapes the children’s experience and their ability to be successful. Preparation of the prepared environment includes:

- Space design and furnishings
- Distribution of ages in mixed-age classroom
- Adult/child ratio
- Time (minimum of three hours of uninterrupted time at the primary and elementary level)
- Materials

Materials in the Montessori environment are presented as keys to further independent activity and exploration. Their purpose is extended activity, which is the basis for the child's own self-construction. Because Montessori views the curriculum as a web, the materials of the various levels are interrelated. Frequently, the same material may be used at several levels, but with a different focus or purpose. Furthermore, although all materials are categorized on the list (e.g., mathematics, language, botany, etc.), their presentation and use in the classroom is integrated to reflect the interrelatedness of all the disciplines – and of life itself.

- [Please see Appendix A-6 for a Detailed List of Instructional Materials, to be included in the prepared environments of the primary and lower and upper elementary levels.](#)

### Long-term Plan Development

Long-term plans provide a roadmap for a classroom for a school year. They're a calendar-view of when the CCSS, NGSS, and CSS are introduced and when the teacher expects each standard might be mastered. This method, called "backwards mapping", is derived from the standards-based backwards design process Grant Wiggins and Jay McTighe developed for unit planning applied to long-term planning.<sup>15</sup> Their standards-based backwards design process supports teachers to have clear priorities and purposes and assists in "un-packing" the CCSS, NGSS, and CSS to reveal the foundational understandings implied by the standards.

When long-term planning, teachers take a macro view of their instruction, determining what standards fit where in the months, weeks, and days of the school year. To backwards map state standards, teachers review state standards in advance of the school year and literally "map" them out onto a calendar of school days (see sample template below). The long-term plan is informed by anecdotal observations, diagnostic, formative, and summative data. It serves as a standards-based pacing guide for the school year and a reference as units are developed using the Backwards Design or Teaching for Understanding Frameworks.

### Unit Plan Development

At Urban Montessori, unit plans are thematic and standards-based. They may focus on one curricular area or be cross-curricular. Their purpose is to provide children with schema or cognitive frameworks that help them organize information, make meaning of what they are learning, and make connections with what they already know.

The School will use two unit planning frameworks: (1) Backwards Design Unit Planning and (2) Teaching For Understanding Unit Planning. Backwards Design Unit Planning is particularly adept at facilitating standards-alignment with theme-driven unit planning. Teaching For Understanding Unit Planning is similar, but its strengths are theme-driven instruction and performances of understanding throughout the unit. Urban Montessori Charter School will support its teachers to use both tools, as

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<sup>15</sup> Wiggins, G. McTighe, J. (2005). Understanding By Design. Second Edition. Alexandria: Association for Supervision and Curriculum Development.

each lends itself well to particular curriculum areas. **Figure A.12** illustrates how the two frameworks are used at Urban Montessori. Over time, and as the instructional team gains familiarity with the tools and the School’s instructional model, it is likely they will both be used across the curriculum.

**Figure A.12 Planning Tools**

Unit Planning Tools at Urban Montessori Charter School		
Framework	Strengths	Planning Priorities
<b>Backwards Design</b>	<ul style="list-style-type: none"> <li>• Unpacking state standards</li> <li>• Theme-driven instruction</li> <li>• Aligned summative assessment</li> </ul>	To address any grade level state standards not taught to mastery through Montessori materials in: <ul style="list-style-type: none"> <li>• English Language Arts</li> <li>• Math</li> <li>• History/Social Science</li> <li>• Science</li> <li>• English Language Development</li> </ul>
<b>Teaching for Understanding</b>	<ul style="list-style-type: none"> <li>• Theme-driven instruction</li> <li>• Performances of understanding</li> <li>• Ongoing assessment</li> </ul>	Unit development in: <ul style="list-style-type: none"> <li>• Design Thinking and Arts Integration</li> </ul>

- [Please see Appendix A-18 for a Detailed Explanation of each Planning Framework](#)

**Weekly Lesson Plans**

At Urban Montessori, lesson plans formalize the teacher’s decisions about what to do and how to do it. They are always flexible to allow adjustments according to the changing needs of the child.

Urban Montessori teachers will work from the three-strand system, with children grouped according to what presentations (or lessons) they need, which often fall into cycles by age. Within the three-year age grouping in the classroom, then, there is a first-year cycle of presentations, a second-year cycle of presentations, and a third-year cycle of presentations. This is a flexible set of guidelines drawn to ensure that all presentations are made each year. Teachers are trained to align presentations with each child’s interest and readiness. L.S. Vygotsky described such alignment as being in the child’s zone of proximal development, or ZPD.

Weekly plans for primary, elementary and middle school are highly individualized, beginning with individual observations of the children and their needs. At all levels, subsequent grouping of children according to those with common needs allows for more efficient and animated group lessons.

- [See Appendix A-19 for an elementary Weekly Lesson Plan Sample](#)

**Weekly Work Plans or Journals**

At Urban Montessori, work plans are a log of each child’s time and activities for the week or day. Depending on the age and readiness of the child for the writing, s/he may keep a work journal instead. The process of documenting his or her own work helps the child feel like a partner in the planning, with responsibility and ownership over his or her education.



The plan or journal will be used in a teacher-child conference at Urban Montessori every week (or other week), depending on the needs of the child. In addition to the plan or journal, the child brings all the work s/he has completed since the last conference. At the conference, the child discusses work that is completed and work planned for the future. If there has been work in one or two curricular areas, the child and teacher may decide to schedule work and presentations in subjects that have been inactive. Productivity and work habits can be discussed. Accountability is part of the work plan and conference process and therefore goals should be clear, achievable, and completed under the consistent observation of the teacher after the child defines the work to be finished.

- [Please see Appendix A-11 for an Elementary Work Plan sample and Appendix A-15 for a Secondary Work Plan sample, called a Planning Guide at this level](#)

## **PLAN FOR CHILDREN WHO ARE ACADEMICALLY UNDER-PERFORMING**

### **Overview**

As stated earlier, Dr. Montessori developed many of her methods by observing and working with children in highly challenging situations including the Orthophrenic School in Rome which served children who were institutionalized and at the first Casa dei Bambini (Children's House) which served children who lived in extreme poverty. Thus, Montessori classrooms were designed to effectively serve children who, historically, were considered either academically low achieving or at-risk. Montessori education addresses the needs of children who are academically behind by providing each child with an individualized plan to accelerate their learning. These plans build on each child's strengths and interests, identify the most promising areas for growth, and focus on instruction in the child's Zone of Proximal Development to promote learning and growth at a rapid pace.

It follows then, that Montessori classrooms are also inherently powerful Tier 1 interventions in alignment with the Response to Intervention (RTI) tiered services model. They are structured to maximize independence and self-directed learning. In every classroom at Urban Montessori there is a trained teacher and trained support teachers with an adult-student ratio between 1:12 and 1:23. This ratio and the independent classroom culture support children who are not making adequate progress by allowing for individualized lessons and targeted attention from teachers. Additionally, since Montessori teachers are constantly observing children and collecting data as part of the assessment system, a child not making adequate progress is noticed immediately, and the adults provide individualized support to that child immediately. Work plans can easily be adjusted to accelerate the learning of low-achieving children without the need for referrals and Student Success Teams, and individualized support plans can be drawn to identify specific developmental and academic areas of need for low-achievers and to establish interventions that are monitored and reviewed regularly. Finally, the multi-age class groupings themselves can be academically forgiving, providing low-achieving children with multiple years to practice and fully master bands of curricular content.

### **A Student Support and Monitoring System**

Urban Montessori teachers utilize multiple data points to monitor student progress (including observations of students engaging within the Prepared Environment, student work, teachers-student conferences, and formal assessments). Teachers assess the whole child, so might notice academic, physical, social, health, developmental, or other area of development. When teachers observe performance levels below expected levels, they implement and document Tier 1 interventions in partnership with the child's family. Teachers also are able to access instructional leaders and

specialists for consultation, additional observations, or services. The RTI team is made up of the following roles: Academic Intervention Specialist, Speech Language Pathologist, Occupational Therapist, Psychologist, and Student Support Assistant.

Tier 1 interventions in the classroom can include:

- In-class individual or small group instruction two to three times per week in a specific area targeted for growth, monitoring progress for six weeks, utilizing strategic materials and resources designed to build conceptual understanding and to accelerate understanding
- Peer support and teaching by an older child in the classroom
- Increased responsibilities in the classroom to build confidence and connectivity to the community
- A personal project that excites the child
- Encouraging the child to utilize more strategic resources and stations in the room the child may have not been utilizing and monitoring progress at that station
- Regular personal goal-setting and check-ins with the child if engagement is of concern
- One to one reading with a trained reading buddy
- Targeted academic follow up work in an online learning platform

Teachers adjust interventions to meet students' needs and typically arrive at a mix of interventions that results in measurable growth. In cases where the interventions do not result in growth, the student is recommended to the Care Team. This team is comprised of the classroom teachers, members of the RTI Team and the student's family. The Care Team gathers information from all parties to conduct a root cause analysis in order to develop an intervention plan that builds on the work of the classroom teacher. This team of professionals and family members agree to action steps and mutual accountability.

Tier 2 interventions outside of the classroom can include:

- Individual or small group instruction four to five times per week in a specific area targeted for growth, monitoring progress for eight weeks utilizing strategic interventions curricula designed to accelerate learning
- Individualized guided practice with trained parents, volunteers, older children, etc (practicing reading, oral discussion, debate, math problems, math facts, etc.)
- Arts/movement therapy
- Counseling services and referrals
- Mentoring, clubs, support groups
- Other health, wellness, and family interventions as needed
- Change of classroom
- Finding exciting and engaging outside-of-school activities and programs that may motivate the child

After another eight weeks, should a student continue to not make adequate progress, the Care Team is reconvened and a plan developed to collect additional data. Additional testing may be requested or observations conducted, both inside and outside of the school setting. These data would help either identify a stronger more effective plan to address the child's needs and/or indicate whether a referral for Special Education is appropriate.

- [Please see Appendix A-20 for the Care Team Support Plan Template](#)

## PLAN FOR CHILDREN WHO ARE ELIGIBLE FOR SPECIAL EDUCATION

### Overview

Urban Montessori shall comply with all applicable State and Federal Laws in serving children with disabilities, including, but not limited to, Section 504 of the Rehabilitation Act (“Section 504”), the Americans with Disabilities Act (“ADA”) and the Individuals with Disabilities Act (“IDEA”). California law gives schools various options on how to deliver special education and related services either as (1) an arm of the charter-granting agency, (2) an independent local education agency, or (3) as a charter SELPA. The School shall be its own local education agency (“LEA”) in conformity with Education Code Section 47641(a). The School LEA is a member of the El Dorado District Office of Education (“EDCOE”) Special Education Local Plan Area (“SELPA”).

- [Please see Appendix A-21 for the EDCOE SELPA Approval Letter](#)

The School shall comply with all state and federal laws related to the provision of special education instruction and related services and all SELPA policies and procedures; and shall utilize appropriate SELPA forms. The School shall not discriminate against any pupil with a disability in the admissions process or any other aspect of operation.

The School shall be solely responsible for its compliance with the IDEA, Section 504 and the ADA. The facilities to be utilized by the School shall be accessible for all children with disabilities. The facilities to be utilized by the School shall provide children with disabilities equal access to all aspects of the educational program.

### Section 504 of the Rehabilitation Act

The School recognizes its legal responsibility to ensure that no qualified person with a disability shall, on the basis of disability, be excluded from participation, be denied the benefits of, or otherwise be subjected to discrimination under any program of the School. Any student, who has an objectively identified disability, which substantially limits a major life activity including but not limited to learning, is eligible for accommodation by the School.

A 504 team will be assembled by the Executive Director of a school and shall include the parent/guardian, the student (where appropriate) and other qualified persons knowledgeable about the student, the meaning of the evaluation data, placement options, and accommodations. The 504 team will review the student’s existing records; including academic, social and behavioral records, and is responsible for making a determination as to whether an evaluation for 504 services is appropriate. If the student has already been evaluated under the IDEA but found ineligible for special education instruction or related services under the IDEA, those evaluations may be used to help determine eligibility under Section 504. The student evaluation shall be carried out by the 504 team, which will evaluate the nature of the student’s disability and the impact upon the student’s education. This evaluation will include consideration of any behaviors that interfere with regular participation in the educational program and/or activities. The 504 team may also consider the following information in its evaluation:

- Tests and other evaluation materials that have been validated for the specific purpose for which they are used and are administered by trained personnel.
- Tests are selected and administered to ensure that when a test is administered to a student with impaired sensory, manual or speaking skills, the test results accurately reflect the student’s aptitude or achievement level, or whatever factor the test purports to measure, rather than reflecting the student’s impaired sensory, manual or speaking skills.

The final determination of whether the student will or will not be identified as a person with a disability is made by the 504 team in writing and notice is given in writing to the parent or guardian of the student in their primary language along with the procedural safeguards available to them. If during the evaluation, the 504 team obtains information indicating possible eligibility of the student for special education per the IDEA, a referral for assessment under the IDEA will be made by the 504 team.

If the student is found by the 504 team to have a disability under Section 504, the 504 team shall be responsible for determining what, if any, accommodations or services are needed to ensure that the student receives a free and appropriate public education (“FAPE”). In developing the 504 Plan, the 504 team shall consider all relevant information utilized during the evaluation of the student, drawing upon a variety of sources, including, but not limited to, assessments conducted by the School’s professional staff. The 504 Plan shall describe the Section 504 disability and any program accommodations, modifications or services that may be necessary.

All 504 team participants, parents, guardians, teachers and any other participants in the student’s education, including substitutes and tutors, must have a copy of each student’s 504 Plan. The site administrator will ensure that teachers include 504 Plans with lesson plans for short-term substitutes and that he/she review the 504 Plan with a long-term substitute. A copy of the 504 Plan shall be maintained in the student’s file. Each student’s 504 Plan will be reviewed at least once per year to determine the appropriateness of the Plan, needed modifications to the plan, and continued eligibility.

### **Services for Students under the IDEA**

Urban Montessori Charter School will be an LEA member of the EDCOE SELPA in accordance with Education Code section 47641(a). Urban Montessori Charter School makes the following assurances:

- *Free Appropriate Public Education* – The School will assure that a free appropriate public education shall be provided to all enrolled students including children with disabilities who have been expelled from school.
- *Child Find* – The School will assure that all students with disabilities are identified in accordance with the policies and procedures of the SELPA.
- *Full Educational Opportunity* – The School will assure that all students with disabilities have access to the full range of programs available to non-disabled students.
- *Least Restrictive Environment* – The School will assure that students with disabilities are educated with students who are not disabled to the maximum extent appropriate. This will be addressed through the use of supplementary aids and services in the general education environment in accordance with each student’s IEP .
- *Individualized Education Program* – The School will assure that an Individualized Education Program (“IEP”) is developed, reviewed and revised for each eligible student under the IDEA.
- *Assessments* – The School will assure that an IEP review shall be conducted on an annual basis at a minimum. In addition a reassessment shall be conducted at least once every three years, in accordance with the IDEA, and more often if conditions warrant or requested by the student’s parents or teacher. Parents will receive reports on their individual student’s progress toward IEP goals and progress at the IEP meeting and student-led conferences.
- *Confidentiality and Procedural Safeguards* – The School will assure that the confidentiality of identifiable data shall be protected at the collection, storage, disclosure and destruction stages. In addition, students and their parents shall be provided with safeguards through the identification evaluation and placement process and provisions for a free appropriate public education.

- *Personnel Standards* – The School will attract, recruit and hire appropriately trained and credentialed personnel to provide special education services to children with disabilities.
- *State Assessments* – The School will assure that students with disabilities either under the Individuals with Disabilities Act (“IDEA”) or Section 504 are included in State assessment programs with appropriate accommodations and modifications when necessary and appropriate. These assessments include, but are not limited to, the SBAC and CAST.

In addition, the School shall comply with the EDCOE Local Master Plan and perform all corrective actions deemed necessary by the EDCOE SELPA. The Director of Special Education at Urban Montessori will work with the Executive Director to develop an annual budget, hire necessary staff, contract for appropriate services and take responsibility for meeting the special education compliance and quality requirements.

The Directors of Instruction and other team members will work with the EDCOE leadership to provide regular professional development that builds the capacity of the special education staff in the areas of promising instructional practices, compliance with state and federal statutes, reporting requirements and use of instructional data. In addition, all staff members will be provided a personalized professional learning plan that will identify high leverages capacity-building learning activities for the teacher. Urban Montessori will maintain at least one Board member or Advisor on its Advisory Board with expertise in Special Education to support the School’s program implementation, staff training, and compliance.

Because Montessori classrooms are differentiated by design and enable individualized learning and support very naturally, the special education leads on the Urban Montessori team believe that a Montessori classroom is ideal setting in which to serve most Special Education students. Because classrooms are multi-age, children can be working at different levels without stigma and without the need for alienation. Montessori teachers are trained to group students according to interest and engagement as well as need and strength, and this enables Special Education students to have their strengths engaged and maximized while having their needs addressed.

Since Urban Montessori Charter School will operate as an LEA of the EDCOE SELPA in accordance with Education Code section 47641(a), the County shall have no responsibility to ensure that the students who attend Urban Montessori Charter School are provided a free appropriate public education. In accordance with state and federal law, each student eligible under the IDEA will be provided a free and appropriate education in the least restrictive environment. The decisions regarding the specific services each student will receive are the responsibility of the Individualized Education Program Team. The team includes the involvement of parents and the decisions are formulated in a written plan (referred to as an IEP).

Urban Montessori Charter School supports all special education students in compliance with state and federal laws. No student will be denied admission to the School because he or she is in need of special education services.

## **PLAN FOR CHILDREN WHO ARE ENGLISH LANGUAGE LEARNERS**

*“Language exerts hidden power, like a moon on the tides.”*

- Rita Mae Brown

## Our Commitment to Language Diversity

Almost one third of Oakland Unified School District’s children are English Language Learners and almost 20% of Urban Montessori’s student population are English Language Learners. Urban Montessori values this linguistic diversity and believes that having fluency in multiple languages, including English, is critical to 21<sup>st</sup> Century success. Our English Language Learner program will ensure that every child assessed as an English Language Learner masters written and spoken English and that these children also retain and build fluency and literacy in their home language.

## Identification and Reclassification of English Learners

### Home Language Survey

The School will administer the home language survey upon a student’s initial enrollment in the School.

### CELDT-ELPAC Testing

All children who indicate that their home language is other than English will be given the California English Language Development Test Proficiency Assessments for California (CELDT-ELPAC) Initial Assessment within 30 days of enrollment<sup>165</sup> to evaluate their listening, speaking, reading and writing abilities in English. English Learners This test will take the ELPAC Summative Assessment be given at least annually between July 1 and October 31 during the testing window (February 1 – May 31), until the student is re-designated as fluent English proficient. The School will notify all parents of its responsibility for ELPAC-CELDT testing and of ELPAC-CELDT results within 30 days of receiving test results from the contractor. The CELDT shall be used to fulfill the requirements under the No Child Left Behind Act for English proficiency testing, until the upcoming planned replacement with the ELPAC

## English Learner Reclassification

Urban Montessori will utilize multiple criteria in determining whether to reclassify a pupil as proficient in English, including but not limited to all of the following:

- Meeting the reclassification threshold on the ELPAC-CELDT.
- Demonstrating achievement in ELA on multiple assessments: at least Standard Nearly Met on state testing and at least 40th percentile on NWEA school benchmark assessment.
- Teacher evaluation indicating that the student is able to fully access school curricula in English.
- Agreement of the family that the child is fluent in English and able to access academic materials without additional language support.

<sup>165</sup> The IA testing window will be year-round (July 1–June 30). Any student whose primary language is other than English as determined by the home language survey and who has not previously been identified as an English Learner by a California public school or for whom there is no record of results from an administration of an English language proficiency test, shall be assessed for English language proficiency within 30 calendar days after the date of first enrollment in a California public school, or within 60 calendar days before the date of first enrollment, but not before July 1 of that school year. The thirty day requirement applies to children who are entering a California public school for the first time or for children who have not yet been CELDT tested. All other children who have indicated a home language other than English will continue with annual CELDT testing based upon the date last tested at the prior school of enrollment.



## The Urban Montessori Charter School English Language Learner Instructional Program

English language proficiency is critical for our children. English proficiency in our society serves as a powerful gatekeeper, opening doors to opportunity for those who reach proficiency and limiting or closing doors to opportunity for those who do not. Access to high quality English instruction for English Learners is an issue of equity. Urban Montessori is committed to effectively serving children who are English Language Learners through a comprehensive approach to language instruction. In particular, our Sheltered English Language Program will be guided by Susana Dutro’s “Systematic English Language Development (ELD)” and supported by SDAIE and Montessori language-rich curricula..

- [Please see Appendix A-22 for “Rethinking English Language Instruction” by Dutro and Moran](#)

In “Rethinking English Language Instruction: An Architectural Approach,” Susana Dutro and Carrol Moran present a framework for English Learner instruction that is a student-centered, language-focused approach to planning and teaching. Designed to address one of the most significant tensions in second language literature, the debate regarding language acquisition versus language learning, the approach prioritizes saying “yes” to both informal and formal language learning opportunities (Beebe, Selinger, Genessee, Long, Cummins and Scover, 1988, Bourhis, 1990). Further, the approach takes into consideration another tension existing in the research, whether students should analyze language processes by looking at language as an object of study and seeking the patterns and rules of language, or by intuiting patterns and rules of language by engaging in purposeful language activity. Their comprehensive framework for English Learner instruction is based on three elements:

1. A Blueprint for English Language instruction (which includes a comprehensive view of the instructional day);
2. Features of Explicit Language Instruction that backwards maps language instruction from task analysis to instruction, explicitly building receptive and expressive language by connecting reading, writing, listening and speaking; and
3. Effective program planning and teacher training.

Urban Montessori intends to continue to utilize this framework using the following practices and Blueprint for English Language Instruction:

Dutro and Moran advocate for rethinking some common ELD practices. They suggest that:

- Language instruction requires teaching English, not just teaching “in” English or just providing time for children to interact with one another in English
- ELD requires purposeful daily instruction in both a developmental program and as explicit preparation for content courses with ample opportunities for both formal and informal learning across the curriculum and throughout the instructional day
- When applying or practicing skills to develop fluency, instruction intentionally provides for output of language as a critical part of the learning process, not just as the assessment or outcome of language development (Swain, 1986).

The blueprint includes three components of ELD to be taught throughout the day:

- The first is a vertical slice of the curriculum. This is systematic ELD referring to English instruction as its own discipline that follows a developmental scope and sequence of language

skills that builds from simple to complex structures within the context of a range of everyday and academic language functions. Instruction is organized by academic English proficiency levels.

- The second component of ELD is "front-loading language," which is instruction that occurs throughout the day as a horizontal slice of the curriculum, across all content areas. Front-loading of ELD describes a focus on language preceding a content lesson. The linguistic demands of a content task are analyzed and taught in an up-front investment of time to render the content understandable to the student. This front-loading refers not only to the vocabulary, but also to the forms or structures of language needed to access and discuss the content.
- The third component of English language instruction maximizes the "teachable moment." That is, the utilization of opportunities as they present themselves to use precise language to fill a specific, unanticipated need for a word or a way to express a thought or idea. Fully utilizing the teachable moment means providing the next language skill needed to carry out a task or respond to an impromptu stimulus, like using a thunderstorm to stimulate a discussion about whether to expand and deepen language skills.

Urban Montessori Charter School seeks to provide English Learners with each of the three components above. The School knows that while such a comprehensive approach may not be required to develop everyday language, it is essential to develop academic language to the level required for college admissions or job interviews.

Urban Montessori Charter School will commit to implementing the Blueprint for English Language Instruction by doing the following:

- Phase in training on all aspects of the framework and comprehensive approach, so that what is most critical is prioritized immediately for both ELD specialist(s) and teachers, with additional trainings in future years of the School's operation, as appropriate and as resources allow.
- Maintain an ELD specialist(s) trained to teach Systematic ELD.
- Continue to implement best practices in ELD by providing classroom teachers with Professional Development opportunities.
- Maintain daily blocks of instruction dedicated to teaching English where Systematic ELD is taught.
- Provide children instruction at their assessed level of English Language Development to ensure they develop a solid English language foundation and are continually challenged to stretch their ability to use language flexibly.
- Teach vocabulary for social and academic purposes from general to increasingly precise words.
- Provide ample oral and written practice for application of newly taught language in authentic contexts.

Systematic ELD does not replace English Language arts instruction or any other content instruction at Urban Montessori. Rather, it equips our English Learners with the language skills they:

- Are not likely to learn outside of school,
- Will not be taught in any other content area,
- Need to express the sophistication of their thinking to succeed in college, and
- Are expected to use every day for academic and real life purposes.

Urban Montessori embraces the following three essential strategies to build a strong ELL program:



### 1. *Common Core State Standards*

Urban Montessori embraces the Common Cores State Standards and the ideas expressed in “Application of Common Core State Standards for English Language Learners.” The School believes that consistent standards across the country will provide appropriate benchmarks for all students. In the area of English Language Arts, the Common Core State Standards are organized into five sections, including reading, writing, speaking and listening, language, and media and technology. The language standards for instruction each year help ensure that students gain adequate mastery of a range of skills and applications specific to the English language regardless of whether English is the child’s first language. Students advancing through the grades are expected to meet each year’s grade-specific standards and retain or further develop skills and understandings mastered in preceding grades. In K-5 and 6-12, language progressive skills by grade are listed. Below are the key points in the English Language Arts language standards:

- The standards expect that students will grow their vocabularies through a mix of conversations, direct instruction, and reading. The standards will help students determine word meanings, appreciate the nuances of words, and steadily expand their repertoire of words and phrases.
- The standards help prepare students for real life experience at college and in 21st century careers. The standards recognize that students must be able to use formal English in their writing and speaking but that they must also be able to make informed, skillful choices among the many ways to express themselves through language.
- Vocabulary and conventions are treated in their own strand not because skills in these areas should be handled in isolation but because their use extends across reading, writing, speaking, and listening.

Urban Montessori aligns the Common Core State Standards into its curriculum. This includes alignment of our ELL Program with the Common Core English Language Arts standards.

### 2. *Additional Sheltered English Instruction (SEI) Program Supports*

In addition to the comprehensive ELD program described above, language acquisition will be a priority across the curriculum. A sample of additional strategies that will be used in Urban Montessori classrooms to support English Learners include:

- Specially Designed Academic Instruction in English (SDAIE) methods
- Frontloading strategies (e.g., pictorial input, comprehension sentence frames)
- Songs, poems, and chants in English to build fluency
- Oral language production from children (e.g., during work time)
- Differentiated instruction (e.g., individualized or small group)
- Listening to audio books to build receptive English and fluency
- Guided reading of leveled texts to introduce English structure and syntax
- Language experience, interactive writing to construct English text
- Interactive and model writing to construct English text
- Word study
- Vocabulary development

### 3. *California English Language Development Test (CELDT)-ELPAC and Reclassification*

A cornerstone of Urban Montessori Charter School’s vision for equity is our school-wide goal to reclassify each of our English Learners as English proficient no later than the end of fifth grade.

## Academic Intervention for English Learners

ELLs who do not make the minimum expected growth of one level per year on the ~~ELPAC~~~~ELDT~~ will be referred to the Care Team.

English Language Learners have access to the same interventions approach described above under ***Plan for Children Who Are Low-Achieving***. Children not making adequate progress on their individualized EL goals receive the appropriate Tier 1, 2, or 3 interventions.

Students who enroll at Urban Montessori at the Beginning Level and who would benefit from primary language support, are placed in a classroom where there is an adult fluent in that child's native language when possible.

Urban Montessori will meet all applicable legal requirements for English Learners related to annual notification to parents, student identification, placement, program options, reclassification of fluent English proficient status, monitoring and evaluating program effectiveness, and standardized testing requirements. The School will implement policies to assure proper placement, evaluation and communication regarding English Learners and the rights of children and parents.

## PLAN FOR CHILDREN WHO ARE HIGH-ACHIEVING

Montessori education has been utilized successfully to meet the needs of academically low-achieving children and high-achieving children. Unlike many programs that separate these groups and provide different programs and use different instructional strategies for low and high achievers, Montessori keeps the children together and uses the same strategies and approaches for all children. Urban Montessori Charter School believes that the Montessori approach and learning environment is ideal for high-achieving children seeking more independence and able to direct their own learning and inquiry. Further, the individualized plans ensure that all children will have a program tailored to their performance levels and their strengths and areas of need. Additionally, because the School will have multi-age classrooms, children who are excelling will be able to become leaders in the classroom, teach others, or work at the pace of older children.

The belief at Urban Montessori is that all children are gifted, and that it is the responsibility of the adults to identify a child's gifts and nurture those gifts. Just as every child is gifted, every child is challenged, and it is the responsibility of the adults to strategically address those challenges and to help children become self-aware of their own strengths and needs. The Design Challenges presented to Urban Montessori children will allow a range of creative solutions, as complex as the children choose. These collaborative inquiries are designed to ensure children are challenged and that children leverage each other's gifts to create a more powerful collective solution to authentic and engaging problems. In Design Thinking, the process of design (which involves defining and solving meaningful, real world problems) will be explicitly taught.

## ELEMENT B: MEASURABLE PUPIL OUTCOMES

*Governing Law: The measurable pupil outcomes identified for use by the charter school. “Pupil outcomes,” for purpose of this part, means the extent to which all pupils of the charter school demonstrate that they have attained the skills, knowledge, and attitudes specified as goals in the charter school’s educational program. Pupil outcomes shall include outcomes that address increases in pupil academic achievement both schoolwide and for all pupil subgroups of pupils served by the charter school, as that term is defined in ~~subparagraph (B) of paragraph (3) of~~ subdivision (a) of Section ~~5205247607~~. The pupil outcomes shall align with the state priorities, as described in subdivision (d) of Section 52060, that apply for the grade levels served, ~~or the nature of the program operated,~~ by the charter school.*

- California Education Code Section 47605-~~6~~(bc)(5)(B)

### PUPIL OUTCOMES

#### Graduating from Urban Montessori Charter School

When children graduate from the 8th grade at Urban Montessori Charter School, they will be academically, socially, emotionally, and intellectually prepared for the high school of their choice and well on their way to becoming powerful, contributing citizens of the world. Urban Montessori’s goal is to have all children graduate:

- **Academically at or above grade-level** with respect to the Common Core State Standards in English Language Arts and Mathematics, the Next Generation Science Standards, the California State Standards in Visual and Performing Arts and Physical Education and Health, and internally developed standards in Character and Peace Education and Technology. This includes content, as well as concepts and critical connections
- With **beginning oral and written fluency in a second language** and able to articulate their understanding and appreciation for language and cultural diversity
- Able to express their understanding and learning in response to **multiple forms of assessments** including essays, self-reflection, standardized tests, presentations, creative performance, art, and technical models and demonstrations
- **Self-directed learners** who are intrinsically motivated, capable of forming their own questions, adept at assessing the broad range of resources available to them to uncover answers, and able to think flexibly in finding answers
- **Emotionally intelligent** with a high level of self awareness with respect to their strengths, opportunities for growth, and learning styles; capable of understanding others’ perspectives different from their own and respectfully and **thoughtfully interacting and collaborating** with the most diverse cohorts
- **Creatively confident** with awareness of the inter-relationships that exist between all things in our world and the ability to turn that understanding into creative actions that **positively contribute to the world**

**CHARTER SCHOOL OUTCOMES THAT ALIGN WITH STATE PRIORITIES (LOCAL CONTROL ACCOUNTABILITY PLAN - LCAP)**

Pursuant to Education Code Section 47605(b)(5)(B), **Figure B.1** below describes the charter school's outcomes that align with the state priorities and the charter school's goals and actions to achieve the state priorities, as identified in **Element A** of the charter. ~~In addition, the charter school will develop API and AYP outcomes both for participation percentages and performance thresholds upon reinstatement in their future forms (these were suspended at the time of this submission).~~

The LCAP and any revisions necessary to implement the LCAP, including outcomes and methods of measurement listed below, shall not be considered a material revision to the charter, and shall be maintained by the charter school at the school site.

**Figure B.1 Goals, Measures, Actions, and Alignment to State Priorities**

<p><b>Goal 1:</b> Students will be able to read grade appropriate texts fluently and with comprehension, to demonstrate facility in expository and narrative writing forms, to communicate ideas and understanding clearly and in detail, and to demonstrate a correct understanding of the rules that govern the English language. Students will be expected to demonstrate and apply their understanding on a variety of assessments.</p>		
Measures	Actions	Alignment
<ul style="list-style-type: none"> <li>● Percent of students who are not meeting RIT Growth Target in ELA as measured by the NWEA will decrease by 5% annually until the goal of 60% of students meeting their target is met, overall and for all applicable subgroups.</li> <li>● Percent of students who are meeting or exceeding state standards in ELA or achieving one performance level of growth as measured by the SBAC will increase by 5% annually until the goal of 75% is met, overall and for all applicable subgroups.</li> </ul>	<ul style="list-style-type: none"> <li>● Provide teachers with professional development that supports alignment of Montessori and CCSS in ELA.</li> <li>● Director of Instruction supports curriculum, instruction, and assessment.</li> <li>● Reading intervention specialist supports small group instruction using reading intervention curriculum and assessments.</li> <li>● Levels Lead positions (UE, LE, Primary) support instruction and vertical integration aligned to UMCS scope and sequence.</li> <li>● NWEA is licensed and teachers are trained annually</li> </ul>	<p>This work is aligned to the following State Priorities:</p> <ol style="list-style-type: none"> <li>1. Quality Teachers, Curriculum, and Facilities</li> <li>2. Alignment to and Implementation of the Common Core State Standards (CCSS), with support for ELLs and other subgroups</li> <li>5. Student Achievement</li> </ol>
<p><b>Goal 2:</b> Students will be able to understand and correctly apply mathematical concepts to simple and complex problems, compute accurately, and coherently explain their mathematical reasoning. Students will be able to demonstrate and apply their understanding on a variety of assessments.</p>		
Measures	Actions	Alignment
<ul style="list-style-type: none"> <li>● Percent of students who are not meeting RIT Growth Target in</li> </ul>	<ul style="list-style-type: none"> <li>● Provide teachers with professional development that supports</li> </ul>	<p>This work is aligned to the following</p>

<p>Math as measured by the NWEA will decrease by 5% annually until the goal of 60% of students meeting their target is met, overall and for all applicable subgroups.</p> <ul style="list-style-type: none"> <li>Percent of students who are meeting or exceeding state standards or achieving one performance level of growth as measured by the SBAC will increase by 5% annually until the goal of 75% is met, overall and for all applicable subgroups.</li> </ul>	<p>alignment of Montessori and CCSS in ELA.</p> <ul style="list-style-type: none"> <li>Director of Instruction supports curriculum, instruction, and assessment.</li> <li>Levels Lead positions (UE, LE, Primary) support instruction and vertical integration aligned to UMCS scope and sequence.</li> <li>NWEA is licensed and teachers are trained annually</li> </ul>	<p>State Priorities:</p> <ol style="list-style-type: none"> <li>Quality Teachers, Curriculum, and Facilities</li> <li>Alignment to and Implementation of the Common Core State Standards (CCSS), with support for ELLs and other subgroups</li> <li>4. Student Achievement</li> </ol>
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**Goal 3: All students will be supported in meeting their goals, including students with identified special needs and English Language Learners.**

Measures	Actions	Alignment
<ul style="list-style-type: none"> <li>70% of students with identified special needs will meet their IEP goals, as measured by audit of IEPs.</li> <li>60% of designated EL students will achieve one band of growth or achieve level <u>3 or 4</u> on <u>ELPACCELD.T</u>.</li> </ul>	<ul style="list-style-type: none"> <li>Provide all general education teachers with appropriate professional development in order to best support accommodations and modifications for special education students.</li> <li>Provide training and develop systems that consistently monitor student progress aligned with IEP goals.</li> <li>Provide professional development for teachers that supports English language learner instruction and development.</li> <li>Purchase of research based EL intervention curriculum.</li> <li>Purchase of EL assessment that provides frequent reporting for teachers, students, and families.</li> </ul>	<p>This work is aligned to the following State Priorities:</p> <ol style="list-style-type: none"> <li>2. Alignment to and Implementation of the Common Core State Standards (CCSS), with support for ELLs and other subgroups</li> <li>4. Student Achievement</li> </ol>

**Goal 4: All students will have increased access to the Montessori prepared environment and school support services.**

Measures	Actions	Alignment
<ul style="list-style-type: none"> <li>Increase Average Daily Attendance by 1% annually</li> </ul>	<ul style="list-style-type: none"> <li>Investment in new Student Information System that provides</li> </ul>	<p>This work is aligned to the following</p>

<p>until goal of 95% is met, as measured/reported by P-2.</p> <ul style="list-style-type: none"> <li>● Reduce the number of school suspension (days) by 10% annually until the goal of 5% or less is met as measured by audit of suspension data, overall and for all significant subgroups.</li> </ul>	<p>updated and clear attendance reporting and trends.</p> <ul style="list-style-type: none"> <li>● Provide staff release time to conduct home visits for chronically absent students.</li> <li>● Utilize communication system that supports auto calls and tracking for absences.</li> <li>● Positive Discipline training for all new and returning staff</li> <li>● Positive Discipline training for UMCS parents/guardians</li> <li>● Student participate in grade level appropriate social and emotional instruction and activities</li> <li>● Development of UMCS school-wide behavior expectations matrix aligned with Positive Discipline and CDE Ed Code</li> </ul>	<p>State Priorities:</p> <ol style="list-style-type: none"> <li>3. Parental Involvement</li> <li>5. Student Engagement</li> <li>6. School Climate</li> <li>8. Student Outcomes</li> </ol>
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**Goal 5: Urban Montessori will develop and implement a Design Thinking program.**

Measures	Actions	Alignment
<ul style="list-style-type: none"> <li>● 100% of students will take part in two Design Challenges per year</li> </ul>	<ul style="list-style-type: none"> <li>● Design Thinking leads participate in ongoing Design Thinking training (summer and during school year) at Stanford d.school.</li> <li>● Design Thinking Leadership Team develops portfolio DT assessment rubric</li> <li>● Design Thinking Leadership Team supports two school-wide design challenges</li> <li>● Design Thinking Leadership Team supports parent/guardian DT workshop</li> </ul>	<p>This work is aligned to the following State Priorities:</p> <ol style="list-style-type: none"> <li>3. Parental Involvement</li> <li>5. Student Engagement</li> <li>7. Broad Course of Study</li> <li>8. Student Outcomes</li> </ol>

**Goal 6: Families and caregivers are empowered to support student learning at home.**

Measures	Actions	Alignment
<ul style="list-style-type: none"> <li>● Six (6) family/caregiver workshops that are aligned with Montessori education, literacy development, and social-emotional learning are provided on an annual basis, as measured by audit of workshop agendas.</li> </ul>	<ul style="list-style-type: none"> <li>● Create parent education committee (families, staff, admin) that identifies needs and organizes scope &amp; sequence for family/caregiver workshops</li> <li>● Develop scope and sequence for family/caregiver workshops that are aligned with Montessori education,</li> </ul>	<p>This work is aligned to the following State Priorities:</p> <ol style="list-style-type: none"> <li>3. Parental Involvement</li> <li>4. Student Achievement</li> </ol>

<ul style="list-style-type: none"> <li>Percent of families/caregivers who agree or strongly agree that workshops strengthen their ability to support student learning at home as measured by survey will increase by 5% annually until the goal of 80% is met, overall and for all applicable subgroups.</li> </ul>	<p>literacy development, and social-emotional learning.</p> <ul style="list-style-type: none"> <li>Provide six family/caregiver workshops that are aligned with Montessori education, literacy development, and social-emotional learning.</li> <li>Organize and provide translation services (Spanish) for all family/caregiver workshops</li> </ul>	
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- [Please see Appendix B-1 for the 2016-17 Urban Montessori LCAP](#)



## ELEMENT C: METHODS OF ASSESSMENT

*Governing Law: The method by which pupil progress in meeting those pupil outcomes is to be measured. To the extent practicable, the method for measuring pupil outcomes for state priorities shall be consistent with the way information is reported on a school accountability report card.*

- California Education Code Section 47605-~~6~~(bc)(5)(C)

### INTRODUCTION

Urban Montessori provides authentic, rigorous, and diverse assessment opportunities for students to communicate and demonstrate their mastery of the outcomes and curriculum identified in **Element A** and **Element B**. Assessment methods incorporate opportunities for students to demonstrate both academic and social-emotional learning.

Assessment will take place in all grades and across subjects, as well as in social-emotional learning. Student assessment at Urban Montessori may include, but is not limited to:

- Baseline and Summative Assessments to measure student growth,
- Coursework and Portfolios to provide an ongoing record of student work that meets mastery,
- Formative Assessments to formally measure achievement on an ongoing basis, including biennial language development assessments, triennial developmental reading assessments, biennial writing assessments, and quarterly standards-based assessments in literacy and math,
- State assessments and/or other standardized tests, as required by Education Code 47605(~~de~~)(12).

### THEORY OF ACTION

Urban Montessori believes that assessments should inform instruction and curriculum, and that assessments must drive accountability towards student learning and growth. That said, Urban Montessori also believes that there must be multiple forms of assessment and, that like learning styles, different children excel on different forms of assessment. Just as it is the responsibility of the adults to figure out how to move a child to high levels of achievement and performance, it is the responsibility of the adults to have a diverse set of assessments by which a child can demonstrate high levels of learning.

Urban Montessori's commitment is not only to ensure every child is prepared for the high school of their choice, but also to ensure every child knows how to demonstrate their level of preparation, that they are able to advocate for themselves, and that they are able to "learn" and "practice" an assessment form that is more challenging for them. The School also believes that for children to be prepared for the 21<sup>st</sup> Century, they must be flexible learners and thinkers. Demonstrating and presenting what you know and what you can do is an important skill for success in today's world.

### FORMS OF ASSESSMENT

Urban Montessori utilizes a combination of assessment measures to ensure monitor student growth toward the pupil outcomes outcomes identified in **Element A** and **Element B**. While Urban Montessori believes that the most powerful assessments a teacher uses are his or her own informal and ongoing assessments, the School is clear that effective and accountable schools have formal assessment



systems to ensure all children are making adequate and consistent growth on multiple objective measures and to inform the teacher’s informal assessment systems.

**Assessment Continuum**

The assessment matrix below provides an overview of the multiple data sources by which the School will measure student outcomes and the goals tied to each measure. Following the matrix is a description of the various assessment measures.

- [Please see Appendix C-1 to see Urban Montessori’s Assessment Calendar](#)

Urban Montessori’s performance goals include absolute measures of proficiency, goals relative to external standards, and annual goals for matched cohorts. Proficiency levels are set at 80% (numeric scale) or 3 of 4 (rubric) across subject areas. The targets listed in the table below are school-wide averages that grow incrementally through the years. The goals have been created to be specific, measureable, attainable, results-based and time-bound to ensure that school improvement efforts are concrete, motivating and realistic. Performances on these measures, taken together, will indicate each child’s progress toward “meeting statewide standards,” as required by law, though no one measure alone will constitute a sole indicator of satisfactory or unsatisfactory progress.

As the California Department of Education (CDE) makes changes within California Assessment of Student Performance and Progress (CAASPP) to the instruments used and/or grade levels and subject areas assessed, the charter school will modify this continuum to ensure alignment to the state requirements. In addition, given the evolving nature of assessment systems, particularly in the area of blended learning tools, Urban Montessori reserves the right to adjust the internal assessment tools used and this shall not be considered a material revision of this charter.

Subject Area	Measurable Outcomes	Assessment Tools	Type of Assessment	Frequency	Proficiency Goal
Language Arts	Children will be expected to read grade-appropriate texts fluently and with comprehension, to demonstrate facility in expository and narrative writing forms, to communicate ideas and understandings clearly and in detail, and to demonstrate a correct understanding of the rules that govern the English Language. Children will be expected to demonstrate and apply their understanding on a variety of performance assessments	NWEA in Reading, Grades 1 - 8	Diagnostic and standards-aligned benchmark	3x/year  (4x/year for students attending summer school)	60% meet projected growth target
		SBAC in ELA, Grades 3-8	Standards-aligned assessment	1x/year	Meet or Exceed
		Report Card (TK-8)	Summary document of all assessments	3x/year	4 out of 5 point rubric
		Portfolio of performance-based assessments (TK-8)	Performance-based assessments	Formal review 1-3/year	4 out of 5 point rubric
Mathematics and Geometry	Children will be expected to understand and correctly apply mathematical concepts to simple and complex problems,	NWEA in Reading, Grades 1 - 8	Diagnostic and standards-	3x/year  (4x/year for students attending	60% meet projected growth target

	compute accurately, and coherently explain their mathematical reasoning. Children will be expected to demonstrate and apply their understanding on a variety of performance assessments.		aligned benchmarks	summer school)	
		SBAC in Math, Grades 3-8	Standards-aligned assessment	1x/year	Proficient or Advanced
		Report Card (TK-8)	Summary document of all assessments	3x/year	4 out of 5 point rubric
		Portfolio of performance-based assessments (TK-8)	Performance-based assessments	Formal review 1-3/year	4 out of 5 point rubric
Cultural Studies and Science	Children will demonstrate understanding of key scientific concepts in the fields of earth, life and physical sciences. Children will be expected to demonstrate and apply their understanding on a variety of performance assessments.	California <del>Science Standards</del> Test (CAST), Grades 5 and 8	Standards-aligned assessment	1x/Year	<del>Proficient or Advanced</del> Meet or Exceed
		Report Card (TK-8)	Summary document of all assessments	3x/year	4 out of 5 point rubric
		Portfolio of performance-based assessments	Performance-based assessments	Formal review 1-3/year	4 out of 5 point rubric
History and Social Science	Children will demonstrate understanding of key geographical, social, historical, political, and sociological knowledge with a deep understanding of the history of the interconnectedness and relevance of the sciences. Children will be expected to demonstrate and apply their understanding on a variety of performance assessments.	Portfolio of performance-based assessments (TK-8)	Performance-based assessments	Formal review 1-3/year	4 out of 5 point rubric
		Report Card (K-8)	Summary document of all assessments	3x/year	4 out of 5 point rubric
English Language Development (in addition to assessments indicated for general education population)	Children will be expected to gain one ELL level per year until reclassification as English language fluent.	<del>CELDT</del> /ELPAC	Criterion-referenced assessment	1x/year	<del>Early Advanced or Advanced</del> <sup>17</sup> Well developed (Level 4) or Moderately developed (Level 3)

<sup>17</sup> ~~Should proficiency designations change when California shifts to the ELPAC, Urban Montessori will utilize the new proficiency benchmarks.~~

Special Education (in addition to assessments indicated for general education population)	Children will be expected to meet the annual goals articulated in the student's Individualized Education Plan (IEP)	Tri and Annual Review Assessments	Diagnostic assessments; criterion-referenced benchmark assessments	1x/year	Meeting all IEP goals
Character and Peace Education	Children will demonstrate self-esteem, independence, responsibility, compassion, openness to new experience and learning, patience and self-discipline, acceptance of others, and effective and satisfying social relationships	Report Card (TK-8)	Summary document of all assessments	3x/year	4 out of 5 point rubric
		Portfolio of performance-based assessments (TK-8)	Performance-based assessments	Formal review 1-3/year	4 out of 5 point rubric
The Arts	Children will demonstrate skills in of a variety of artistic media, including drawing, painting, sculpture, printmaking, 2-D design, 3-D design and photography. Children will apply their creative skills in arts integrated projects in core subjects, Design Challenges, and fine arts exhibitions, developing and articulating their learning through Studio Habits of Mind.	Report card (TK-8)	Summary document of all assessments	3x/year	4 out of 5 point rubric
		Portfolio of performance-based assessments (TK-8)	Performance-based assessments	Formal review 1-3/year	4 out of 5 point rubric
Physical Education and Health	Children will be expected to understand how their physical health and well being are tied to physical fitness and proper nutrition and have a greater understanding of the forces challenging global and local health.	Report Card (TK-8)	Summary document of all assessments	3x/year	4 out of 5 point rubric
		President's Physical Fitness Test (5 and 7)		1x/year	Participant fitness
World Languages	Children will be expected to gain knowledge, skill and understanding of the language and cultural heritage featured in their world language class and have a greater appreciation and awareness of our multilingual society and world.	Portfolio of performance-based assessments	Performance-based assessments	1-3/year	4 out of 5 point rubric
		Report Card (TK-8)	Summary document of all assessments	3x/year	4 out of 5 point rubric
Technology	Children will demonstrate an ability to utilize up-to-date technologies as part of and as demonstration of their learning, regardless of subject matter. Children will be expected to identify and apply appropriate technological	Report Card (TK-8)	Summary document of all assessments	3x/year	4 out of 5 point rubric
		Portfolio of performance-based assessments	Performance-based assessments	1-3/year	4 out of 5 point rubric

	solutions on a variety of performance assessments.	Portfolio of performance-based assessments	Performance-based assessments	1-3/year	4 out of 5 point rubric
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**Criterion-Referenced and Formative Assessments**

Urban Montessori is committed to using both criterion-referenced/standards-aligned assessments and diagnostic/formative assessments in our school-wide assessment plan. Criterion-referenced assessments will be used to monitor whether children are mastering grade level standards, and to identify standards to focus on in the classroom. These assessments are also disaggregated to identify trends, find specific areas of instructional strength and weakness, and to ensure children are making progress towards grade-level proficiency against state standards.

Formative assessments will be used not just to inform instruction, but also to track and monitor student growth and learning. Montessori teachers are trained to develop individualized work plans for each child. Each child will have an active role in defining their work plan and will monitor his or her own work in that plan on a progress sheet. The teacher and child will meet regularly to ensure the child is making progress on his or her work plan. As part of this process, teachers lead children in selecting work to go into their portfolio. They collect evidence of performance in their portfolio with their self-reflections on the work and completed rubrics. Children will be coached to talk intelligently and communicate their current level of performance, how they feel about the work they did, and what they learned to their families to other children, and to teachers.

In addition, all children in grades 1-8 will be assessed in reading and math using NWEA assessments. The NWEA assessments were specifically adopted because they are aligned to the Common Core, are computer adaptive, present powerful reports that track both growth and performance against common core standards, and are ideal for individualized learning. By selecting assessment tools that can be both formative and standards-aligned, the School minimizes assessment fatigue for both children and teachers but provides the same or better information to both inform instruction and ensure the school is moving all children towards mastery of grade-level standards. Teachers will give these assessments to children at least 3 times per year. Assessment data will be used both to support the development and monitoring of individualized plans and to track each individual’s growth over time against targets.

**Design Challenges**

Urban Montessori utilizes Design Challenges, a collaborative performance assessment that requires students to apply their learning in authentic interdisciplinary tasks that are intriguing and relevant. Rubrics are used to evaluate Design Challenge work, and the community is invited to participate in the evaluation of their responses. Urban Montessori feels strongly that these types of authentic assessments are the most accurate form of assessment in determining academic mastery and growth and that authentic assessments must be part of a comprehensive assessment system that regularly evaluates children and monitors their learning and growth.

**Portfolio of Performance-Based Assessments**

Urban Montessori is developing a portfolio-based performance assessment system to ensure students’ responses to authentic tasks, daily teacher observations, students reflections and work plans/logs are incorporated into the formal assessment system. Urban Montessori is actively exploring digital portfolio options where teacher observation data, student work plans and logs, and

performance on authentic tasks can be captured digitally. However, this data is currently collected in hard copy format by the teacher. Teachers incorporate portfolios in their data check-ins, which occur every six to eight weeks. Portfolios are shared with families during the student led conferences in February, and again at the end of the year and are reported on in the formal report card.

### State Assessments

Urban Montessori will annually administer each of the following assessment measures under the CAASPP, or legal equivalent, to all students required to take each battery of tests:

- Smarter Balanced Assessment Consortium (SBAC)
- California Science Test (CAST)
- California Alternate Assessments (CAA)
- ~~California Standards Test (CST)~~
- ~~California English Language Development Test (CELDT)~~ English Language Proficiency Assessments for California (ELPAC)
- Physical Fitness Test (PFT)

~~Urban Montessori is subject to all state (API) and federal (AYP) assessment and accountability requirements.~~ If Urban Montessori does not administer tests with the County, Urban Montessori hereby grants authority to the State of California to provide a copy of all test results directly to the County as well as Urban Montessori. Test results for the prior year, if not provided directly to the County by the State, will be provided by the charter school to the County no later than 30 days after receipt of said results.

The results of these state assessments will be an indicator of overall school wide performance, class performance, grade-level performance, and subgroup performance. These tests will be one of multiple assessment methods used to document and monitor student growth on a continuum of achievement.

### State Assessment Modifications and Accommodations

Children with disabilities under the Individuals with Disabilities Improvement Act or Section 504 are included in State standardized testing and will be afforded the appropriate accommodations/modifications where necessary and appropriate.

### **TRACKING OF ASSESSMENT DATA**

All student data is recorded into the assessment database to ensure performance on multiple assessments is captured. Teacher notes and observations, performance on criterion-referenced assessments, growth on formative assessments, children's reflections on their own growth, performance in their portfolios, teacher rubrics, work plans, and performance on Design Challenges are all recorded in one system to ensure the summative report card is indeed summative and includes data from multiple assessments. The report card is a report generated from our assessment platform that presents the most current assessment data in ALL content areas where student and teacher comments and reflections are incorporated.

### Integration of Technology and Assessment Systems

Urban Montessori is committed to ensuring that the School's assessments are part of a system that collects the assessment data, organizes that data so that it is easily reportable and easy to query, connects to other data systems (human resources, student information) and enables multiple stakeholders to access and interact with that data. In too many schools, parents and children have

little to no access to growth and performance data. There are numerous organizations working on the development of comprehensive solutions that integrate data from multiple sources, allow teachers to create and incorporate authentic assessments, and provide the capacity for multiple stakeholders to interact with that data. Urban Montessori is currently piloting a system to make ongoing assessment data easily accessible to all stakeholders.

## **USES OF ASSESSMENT DATA**

### **Student, Teacher and School Use of Data**

#### Cycles of Inquiry

Urban Montessori teachers and administrators engage in on-going cycles of inquiry into their practice and its connection to student learning outcomes. They examine data every six weeks individually with the Director of Instruction to review performance for all children in their classrooms, as well as in collaborative teams to review class performance and benchmark data. In both cases, teachers are guided to look at how children performed on multiple measures during that six-week cycle, identify patterns of underperformance or high performance, and identify focus children who are not making adequate progress. Collaborative teams use these opportunities to form questions that arise from the data, develop hypotheses around the questions, and pursue different strategies or actions to improve student outcomes. Teachers are coached in using various inquiry protocols to ensure the School is building teacher capacity to facilitate and conduct cycles of inquiry both formally and informally.

Urban Montessori understands that teaching to deep understanding and mastery is complex, that teachers cannot approach this complex task formulaically. They must develop hypotheses about how a given child might master a particular objective based on that child's interests, current level of ability, level of engagement, personality, learning style, etc. Should the hypothesis be incorrect, as a researcher, an effective teacher would use that data to form another hypothesis and continue this line of inquiry until success is achieved. Urban Montessori builds this capacity in teachers and builds a culture of teacher inquiry.

#### Promotion and Retention Policies

At Urban Montessori Charter School, our belief is that the most effective intervention for a child who is struggling to meet grade-level standards is quality differentiated instruction, individualized targeted support, and a comprehensive Response to Intervention system. There is little research supporting retention as an effective intervention in accelerating learning. In fact, most research demonstrates that retention is an ineffective intervention, and that children who are retained are more likely to have lower levels of proficiency, GPAs, attendance rates, and graduation rates.<sup>18</sup>

The Montessori model is designed to individualize instruction and differentiate support using developmentally appropriate practices. Every child receives an individualized learning plan that is developed to capitalize on a child's unique interests and strengths and address a child's unique needs. Because children are learning in multi-age classrooms settings, they are given three-year cycles to demonstrate mastery. Multiple years in a given classroom enable children to develop strong relationships with the adults, become proficient in their communities and in their learning environment, and feel comfortable in a wide range of skills, abilities, and developmental phases. In addition, when a

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<sup>18</sup> Roderick, M., & Nagaoka, J. (2005). Retention under Chicago's high-stakes testing program: Helpful, harmful, or harmless? *Educational Evaluation and Policy Analysis*, 27(4), 309–340.

child might truly benefit from another year in a given classroom, because some children remain and some move on from each class every year, the stigma of staying will be negated.

At Urban Montessori, decisions about whether a child should move forward from primary to lower elementary to upper elementary to secondary and ultimately on to high school will be decided case by case in the best interest of the child. This decision will be made collectively by teachers, families, the child when appropriate, and UM leadership. That said, the School understands the consequences of sending an over-aged child to high school and will make it a priority to ensure EVERY child is prepared to go to high school before the age of 15.

**School and Family Use of Data - Reporting to Caretakers**

Urban Montessori ensures every family has access to student performance data on a regular basis. The School believes that effective schools are often effective because families and community have the means to advocate for their children and hold the school accountable. The School welcomes that level of advocacy and thinks that that ability begins with access to data and information. At the beginning of every school year, the School will hold community meetings to share its assessment philosophy and system and to train the families on how to access and understand assessment data. Urban Montessori’s goal is that every family and child be able to access their child’s data and reflections on his or her performance on a computer system. Until that technology is realized, the School will hold family accountability sessions throughout the year to share school-wide progress and regular family meetings about individual student progress.

Urban Montessori will also continuously inform parents about their individual child’s progress, through a combination of formal and informal reporting structures. Informal reporting to parents may occur through such methods as face-to-face conversations, phone calls, text messages, emails, and written notes. Formal reporting to families will include Report Cards, Assessment Results, Student-led Conferences, and Expositions of Student Work as detailed in the figure below. Reports will be user-friendly and provided in the families’ native language. Parents will have access to performance tasks, content assessments, and portfolios upon request and at Student-led Conferences.

- [Please see Appendix C-2 to see an example of the Urban Montessori Report Card at each grade level.](#)
- [Please see Appendix C-3 to see an example of a Family Information Session to Understand Assessment Results](#)

Type	Purpose	Frequency
Mailings & Information Sessions	<ul style="list-style-type: none"> <li>● Share key assessment data with families as collected to ensure families have access to data on their children (i.e., NWEA, <del>CELDTELPAC</del>, CAASPP).</li> <li>● Provide information sessions to support families in understanding assessment results</li> </ul>	Ongoing
Online Grade Book and Work Tracker	<ul style="list-style-type: none"> <li>● Provide transparency on daily student work, lessons given and progress toward learning goals</li> <li>● Develop ownership of learning and goal-setting for both the student and family</li> </ul>	Ongoing



<p>Comprehensive Report Card</p>	<ul style="list-style-type: none"> <li>● Assessment Data</li> <li>● Attendance Data</li> <li>● Grades in Subject Areas &amp; Character</li> <li>● Narratives on Student Performance, including Areas of Strength and Areas for Growth</li> </ul>	<p>Three times per year</p>
<p>Student-led Conferences</p>	<ul style="list-style-type: none"> <li>● Develop and revisit academic and personal goals</li> <li>● Review student work and measure progress toward mastery of learning targets, and ultimately, passage.</li> <li>● Share student performance and progress on internal and external assessments</li> <li>● Develop ownership of learning and goal-setting for both the student and family</li> <li>● Develop student presentation skills</li> </ul>	<p>Twice Yearly</p>

**SCHOOL, DISTRICT, AND STATE USE OF DATA - ACCOUNTABILITY**

**School Level Accountability**

Urban Montessori will utilize multiple streams of data to review program effectiveness and inform programmatic decisions on a regular basis. Sources of data include, but are not limited to, ~~API scores, AYP details,~~ CAASPP results, interim benchmark assessment results, unit assessment results, student reflections, portfolio evaluations, report cards, student, staff and family satisfaction surveys, discipline referrals, attendance rates, and student/family attrition rates.

Where appropriate, the data will be broken out by bands, target subgroups, grade-level, individual class, and individual child, and will be collected, analyzed, and disseminated in a transparent manner that promotes accountability and continuous improvement amongst members of the school community. Urban Montessori will employ a universal inquiry cycle to review the various types of data generated about the school program.

Urban Montessori will continuously review academic content and instruction in light of the data produced in accordance with this section, and will make improvements in curriculum, instruction and professional development as appropriate. To this end, the Local Control and Accountability Plan (LCAP) will be developed each year with input from the School’s community, staff, and board.

Local Control Accountability Plan (“LCAP”)

Urban Montessori will use the multiple forms of data collected to assess progress toward the goals outlined in **Element A** and **Element B** of this charter. Pursuant to Education Code Section 47606.5, on or before July 1, 2017, and each year thereafter, the School will produce a Local Control Accountability Plan (“LCAP”), which shall update the goals and annual actions to achieve the goals identified in **Element A** and **Element B** of this charter regarding the State Priorities, using the LCAP template adopted by the State Board of Education. The Charter School shall submit the LCAP to ACOE annually on or before July 1, as required by Education Code Section 47604.33.



## **Board of Directors**

Charged with stewardship of public school funds, the Urban Montessori Board will systematically review the schools' data in order to monitor trends in student learning outcomes and ensure that there are sufficient and appropriate financial and human resources to properly enact the School's program and remain true to the charter. The Board will work in conjunction with the Urban Montessori leadership and community to make necessary changes in response to identified needs as reflected in the School's data streams.

### Reporting to Broader Community

#### School Accountability Report Card (SARC)

Urban Montessori will compile data for the School each academic year to produce a School Accountability Report Card (SARC). Student achievement data will be disaggregated annually to clearly identify the academic performance of students by sub-groups (e.g., by ethnicity, gender, English Learners, socioeconomically disadvantaged students, and students with disabilities). This report will include required school data for our authorizing agency, parents, Board of Directors, and community at large.

#### Title III and IDEIA

In accordance with Title III, Urban Montessori will adhere to all mandated reporting guidelines in relation to English Learners, including notification to parents regarding ~~ELPAC~~ ~~GELDT~~ results and reclassification. In accordance with IDEIA, Urban Montessori will comply with all state and federal laws regarding reporting requirements for children with IEPs, including, at a minimum, trimester reports to a Special Education student's parents on progress towards goals stated within the IEP.

#### County Visitation/Inspection

The School will comply with a County requested visitation process to enable the County to gather information needed to validate the School's performance and compliance with the terms of this charter. The School agrees to and submits to the right of the County to make random visits and inspections or observations in order to carry out its statutorily required oversight in accordance with Education Code Section 47607.

#### Response to Inquiries

Pursuant to Education Code Section 47604.3 the School shall promptly respond to all reasonable inquiries including, but not limited to inquiries regarding its financial records from the County Office of Education, District Board of Education, and the State Superintendent of Public Instruction.

## ELEMENT D: GOVERNANCE STRUCTURE

*Governing Law: The governance structure of the charter school, including, but not limited to, the process to be followed by the charter school to ensure parental involvement.*

- California Education Code Section 47605.6(~~bc~~)(5)(~~DE~~)

Urban Montessori works in collaboration with families and the community to ensure its success. Its organizational model is derived from best practices in order to ensure that the school meets its stated mission, that adequate resources are marshaled in the service of that mission, and that all stakeholders have a voice in the ongoing development of the school.

### OVERVIEW

The governance structure of Urban Montessori has the following components:

- California Non-Profit Public Benefit Corporation
- Board of Directors
- Head of School
- Family Advisory Council, whose membership may also serve on the:
  - English Language Advisory Committee (ELAC) or equivalent, if there are more than 21 English Language Learners

Within this governance structure, the Board of Directors make decisions and works with the Head of School to oversee the school's development, school operations, academic program, fundraising, and other related activities with critical input from staff and community; the Family Advisory Council works to increase the achievement and engagement of every student through continuous improvement of curriculum, instruction, assessment, and culture; and the ELAC communicates the positions of the parents directly to the Head of School.

- [Please see Appendix D-1 for the Urban Montessori Organizational Chart](#)

### NON-PROFIT PUBLIC BENEFIT CORPORATION

Urban Montessori shall be operated as a California Nonprofit Public Benefit Corporation in accordance with Education Code Section 47604. The School will be governed by the Board of Directors pursuant to its corporate bylaws, which shall be consistent with this charter.

Urban Montessori will operate autonomously from the Authorizer, with the exception of the supervisory oversight as required by statute and other contracted services as negotiated between the Authorizer and the School. Pursuant to California Education Code Section 47604(~~de~~), the Authorizer shall not be liable for the debts or obligations of Urban Montessori, or for claims arising from the performance of acts, errors, or omissions by Urban Montessori, if the Authorizer has complied with all oversight responsibilities required by law.

Included as appendices are the Articles of Incorporation, Corporate Bylaws, and Conflict of Interest Code for Urban Montessori, which will be amended from time to time by the Board of Directors in accordance with the bylaws.

- [Please see Appendix D-2 for the Urban Montessori Corporate Documents, including Articles of Incorporation, 501c3 Status, Bylaws, and Conflict of Interest Code](#)

## **BOARD OF DIRECTORS**

Urban Montessori shall be governed by a corporate Board of Directors who shall be selected, serve, and govern the School in accordance with the adopted corporate bylaws, which shall be maintained to align with the terms of this charter and applicable law. Urban Montessori, Inc., a California nonprofit public benefit corporation, will serve as the sole statutory member of Urban Montessori and will be responsible for, among other things, appointing the Board of Directors of Urban Montessori as outlined in the Urban Montessori bylaws.

The Board shall be composed of at least nine (9) and no more than eleven (11) directors. All members of the Board shall serve two-year terms and until a successor director has been designated and qualified in compliance with the Board's bylaws.

In accordance with Education Code Section 47604(~~cb~~), the Authorizer may appoint a representative to serve on the Urban Montessori Board of Directors.

- [Please see Appendix D-3 for the Urban Montessori Board of Directors' Biographies](#)

## **Board Duties**

The Urban Montessori Board of Directors will be responsible for the operation and fiscal affairs of the School, including but not limited to:

- Approval of the annual budget, calendar, salary schedules, major fundraising events, and grant writing;
- Negotiation and approval of an MOU or other contracts with the Authorizer;
- Approval of bylaws, resolutions, and policies and procedures of school operation;
- Approval of all changes to the charter to be submitted to the Authorizer as necessary in accordance with applicable law;
- Long-term strategic planning for the School;
- Participation as necessary in dispute resolution with the Authorizer;
- Monitoring overall student performance;
- Filling the position of Head of School, as necessary;
- Evaluating the Head of School;
- Monitoring the performance of the School and taking necessary action to ensure that the School remains true to its mission, charter, and applicable laws;
- Monitoring the fiscal solvency of the School;
- Participation in the School's independent fiscal audit, including the resolution of any audit findings;
- Participation in the School's performance report to the Authorizer;
- Approve Annual Review and Revisions of the Local Control Accountability Plan (LCAP);
- Participation as necessary in student expulsion matters;
- Increasing public awareness of the School; and
- Fundraising efforts

The Board of Directors may initiate and carry out any program or activity that is not in conflict with or inconsistent with its charter, governance documents, and any applicable law and which is not in conflict with the purposes for which charter schools are established.

## Board Meetings

The Board of Directors will meet regularly to review and act on its responsibilities. All meetings of the Board of Directors shall be held in accordance with the Brown Act [and Education Code Section 47604.1\(c\)](#), and in compliance with the Bylaws. The Board Meeting schedule, agenda and location will be posted on the Urban Montessori website and in a place accessible by the public in accordance with the Brown Act to encourage participation by the public and in particular by parents and guardians. Meetings will be open to the public and include time for public comment. However, the Board reserves the right to meet in closed session and discuss items for which closed sessions are permitted under the Brown Act. Decisions made in closed session will be reported in open session at the conclusion of the closed session. The board meetings will be held in compliance with the Bylaws.

The Board of Directors shall adopt a conflicts code which shall comply with the Political Reform Act, [Government Code Section 1090, et seq., as set forth in Education Code Section 47604.1,](#) Government Code Section 87100, and applicable conflict restrictions required by the Corporations Code and any conflicts statutes or regulations that may be adopted in the future as applicable to the School. The corporation will have an approved conflict of interest policy on file at the County, and all members will file Form 700 annually.

The Board of Directors meetings will be headed by the Chairperson of the Board, who will be elected annually by the Board of Directors.

## Board Delegation of Duties

The Board may execute any powers delegated by law to it and shall discharge any duty imposed by law upon it and may delegate to an employee or contractor of the School any of those duties with the exception of employment of the Head of School, approval of Board policies, approval of the budget or budget revisions. The Board however, retains ultimate responsibility over the performance of those powers or duties so delegated. Such delegation will:

- Be in writing;
- Specify the entity designated;
- Describe in specific terms the authority of the Board of Directors being delegated, any conditions on the delegated authority or its exercise and the beginning and ending dates of the delegation; and
- Require an affirmative vote of a majority of present Board members

The Board of Directors has two regular committees which meet in accordance with the Brown Act, as applicable, and do not have decision making abilities, but instead make recommendations to the Board of Directors. The Board currently has two regular committees: Academic Oversight and Finance. The Academic Oversight Committee meets monthly (10 times per year) to review student achievement progress, identify gaps and trends, ask questions, provide input to the Head of School, and review relevant policy drafts. The Finance Committee also meets monthly (10 times per year) and oversees the school's fiscal health, including monthly budget to actual reports, fundraising efforts, and facility planning. The Board of Directors may elect to add or remove committees, or to change their meeting schedule.

## HEAD OF SCHOOL

The Board of Directors oversees the Head of School for the school, who is responsible for administering the school in all of the aspects of its day-to-day operations, working with the Board of Directors, the Authorizer, children, parents, and community members. The Head of School is the

leader of Urban Montessori Charter School. The Head of School will report directly to the Board of Directors, and s/he is responsible for the orderly operation of the School and the supervision of all employees in that school.

The Head of School's duties shall include, but are not limited to, the following:

- Understand, promote and support the mission, vision and guiding principles of Urban Montessori.
- Ensure that all school staff understand, promote and support the mission, vision and guiding principles of Urban Montessori.
- Develop and monitor the school program.
- Communicate school-wide instructional practices and pedagogical approach to staff, parents, children and the community.
- Coordinate the use of standardized tests and other assessments.
- Develop the school's annual performance report and SARC.
- Develop the Annual Update and Revisions of the Local Control Accountability Plan (LCAP) in collaboration with stakeholders;
- Contribute to the development of a school-wide "ethic of critical inquiry" through actively participating in school and classroom-based research and evaluation activities focused on improving practice.
- Lead annual, quarterly and ongoing reviews of student achievement data for continual school improvement
- Ensure continual curricular review and acquisition of relevant materials, using student achievement data analysis to drive decision-making.
- Develop and administer the budget as approved by the Board of Directors in accordance with generally accepted accounting principles; present at a minimum quarterly financial reports to the Board of Directors.
- Draft the school budget for Board approval. Monitor the budget and provide regular reporting to the Board of Directors. Assure that necessary equipment and supplies are available to support the school's program and enhance the school's physical plant.
- Attend meetings at the Authorizer as requested by the Authorizer and stay in direct contact with the Authorizer to assist the Authorizer in its oversight duties.
- Stay up-to-date on school laws and regulations.
- Ensure ongoing professional development, prioritization and evaluation of program effectiveness.
- Act as a resource to all staff in the development and implementation of the school's programs.
- Welcome input from staff, parents, children and Board of Directors on the school's functioning through formal and informal structures in order to make positive changes over time while maintaining program continuity and comprehensiveness.
- Through an established supervision process and daily informal observation, acquire thorough understanding of individual styles and strengths of all the teaching and administrative staff of the school. Continually work to help all teaching staff reach instructional goals and improve their performance.
- Provide opportunities and encouragement for staff to grow professionally. Directly or indirectly facilitate the work of staff in groups. Assist all staff in providing improved learning environments for children.
- Provide overall supervision of student teachers, interns, and other unpaid classroom and school volunteers at the school.
- In regularly scheduled staff meetings, work with teachers to:
  - Anticipate future needs
  - Discuss potential problems and generate potential solutions

- o Coordinate programs and procedures
- Involve parents and the larger community
- Help teaching staff to be aware of, and comfortable with, diversity in teaching styles and techniques. Assign teaching staff to non-instructional duties in line with their interests, capabilities and teaching loads. When there is a vacancy in the teaching staff, seek out and interview qualified applicants. Ensure compliance with all regulations regarding teachers' credentials.
- Develop a sense of community while respecting and responding appropriately to the strengths and needs of staff. Be available to staff on a consistent daily basis to help address their individual and collective needs. Act as a liaison, when necessary and appropriate, between parents and staff. Actively seek parent, student and staff input and involvement in key decisions that affect the school.
- Demonstrate excitement about learning and excitement about engaging children in learning. Attempt to know every student attending the school and uphold high expectations for children and teaching staff. Provide appropriate discipline and encouragement for children when necessary. Provide a meaningful and efficient system for maintaining necessary student records. Attend IEP meetings as required by law.
- Be available to parents on a regular basis. Keep parents informed of and involved in policy changes at the school. Encourage parent support and cooperation and enlist their efforts to sustain well-kept school structure. Plan and conduct interesting and informative parent meetings.
- Establish and maintain communication with the school's internal and external community.

The above duties may be delegated as approved by the Board of Directors to another employee of Urban Montessori or to an appropriate third party provider as allowed by applicable law.

## **FAMILIES**

### **Family Participation in Governance**

Urban Montessori will ensure parents and caregivers have an opportunity to participate in the governance of its school through the Family Advisory Council ("FAC"). The FAC is a body consisting of elected representatives from each classroom. The FAC will work to facilitate effective communication among parents, teachers and administration. The Family Advisory Council shall meet regularly as a body and in classroom meetings that are co-lead with the teacher. Two seats on the Urban Montessori school Board of Directors shall be reserved for the FAC.

### **ELAC**

In addition, for so long as there are more than 21 ELLs in attendance, as is current practice, Urban Montessori will have an English Learner Advisory Committee (ELAC) or equivalent. All families have the opportunity to participate on the school's ELAC, with parents of ELLs comprising at least the same percentage of the ELAC membership as ELLs constitute of the School's total student population. The ELAC will advise the Head of School and staff on programs and services for English learners, advise the School Leadership on the development of the [Schoolingle](#) Plan for Student Achievement (SPSA), develop the school's needs assessment, implement the school's annual language census, and help make parents aware of the importance of regular school attendance.

### **Opportunities for Family Involvement**

The School recognizes that children learn best when parents and caregivers are engaged in their education. To encourage parent participation in all aspects of school life, the School features:

1. **Special family sessions** - Scheduled throughout the year, sessions will teach the families about their child's particular plane of development, our educational model and approach for that particular plane of development, and ensure families and schools are working in alignment and in partnership around the children's education.
2. **Participation in school decision-making** - Families have representatives on the Family Advisory Council, and the FAC will have two representatives on the Board of Directors. See Family Participation in Governance above.
3. **Opportunities to evaluate their schools and the staff** - Annually, parents will be asked to complete a survey evaluating their school, the principal, and their child's teachers. The survey results will be reviewed by the School staff and will be a factor in personnel decisions.

The School will provide a variety of opportunities that support families in meaningful participation, leveraging their different skills, needs, and interests. Opportunities may include helping in classrooms, leading extra-curricular activities, coaching sports teams, assisting with event planning, attending field trips, attending FAC meetings, serving on parent committees, fundraising, office support, mentoring children, and communicating with other parents.

## ELEMENT E: EMPLOYEE QUALIFICATIONS

Governing Law: The qualifications to be met by individuals to be employed by the charter school.

- California Education Code Section 47605.6(~~cb~~)(5)(~~EF~~)

### GENERAL QUALIFICATIONS OF SCHOOL EMPLOYEES

Urban Montessori shall be nonsectarian in its employment practices and all other operations. The School shall not discriminate against any individual (employee or pupil) on the basis of ethnicity, national origin, gender or disability or any of the characteristics listed in Education Code Section 220.

All employees of Urban Montessori will be expected to meet the following general qualifications:

- Able to build immediate and loving rapport with children of all ages; strong understanding of child development and adolescent development
- Sense of humor, high ethical professional standards, equity perspective
- Passion for teaching and working with children from urban communities, with specific knowledge and understanding of the needs of children from different experiences, languages and backgrounds
- Excellent communication, presentation and interpersonal skills with demonstrated ability to speak and write clearly and persuasively
- Enthusiasm and commitment to participating in a cooperative effort to launch Urban Montessori, with commitment to the vision, mission and guiding principles of the School
- Driven adult learner dedicated to his or her own professional growth
- Adaptability to change with the necessary skills to work in a creative and demanding learning environment, including the ability to problem-solve and manage ambiguity and adversity
- Working knowledge of another language highly preferred, ideally a language spoken by families at Urban Montessori

In accordance with the Urban Montessori health and safety policies, described below, all employees shall be fingerprinted and background-checked and receive background clearance and tuberculosis clearance prior to commencing employment with Urban Montessori. In addition, employees must obtain First Aid/CPR Certification.

Urban Montessori's Head of School, Directors of Instruction, and Teachers will meet the qualifications detailed below. These qualifications may be modified at Urban Montessori's discretion without any need to materially revise the charter as long as any changes are consistent with the law.

#### Head of School Qualifications:

Urban Montessori's Head of School will lead Urban Montessori and be responsible for the school and children achieving the outcomes outlined in this charter petition. The Head of School will have the following qualifications:

#### *Required*

- Ability to build immediate and loving rapport with children of all ages; strong understanding of child development and adolescent development



- Appreciation for and understanding of Montessori methods and philosophy
- Passion for teaching and working with students from urban communities, with specific knowledge and understanding of the needs of students from different experiences, languages and backgrounds
- Minimum three years successful classroom teaching experience
- Ability to provide leadership and serve as a mentor
- Previous experience in a senior leadership role for at least two years per position held, leading direct and indirect reports on teams of at least 15 people
- Track record of grooming and promoting team members to roles of increasing responsibility
- Experience managing a growing start-up organization, specifically related to building and inspiring a strong professional culture, strategically aligning and securing resources, creating and implementing accountability systems, managing transitions
- Excellent organization, time management and follow-up skills as demonstrated by either a portfolio of implemented strategies or other concrete artifacts that illustrate the presence of these skills
- Adaptability to change; able to work in a creative and demanding learning environment and to problem-solve and manage ambiguity and adversity
- An ability to articulate team-building strategies and evidence of having successfully implemented those strategies
- Computer literacy and comfort with acquiring new technology skills
- Understanding of how to use data effectively to inform instruction
- Understanding of State Content Standards/Common Core and how to map curriculum to those standards
- Sense of humor, high ethical professional standards, equity perspective
- Excellent communication, presentation and interpersonal skills with demonstrated ability to speak and write clearly and persuasively
- Enthusiasm and commitment to participating in a cooperative effort to launch Urban Montessori, with commitment to the vision, mission and guiding principles of the School
- Driven adult learner dedicated to his or her own professional growth
- Working knowledge of another language

*Preferred*

- Doctoral degree (EdD) or Master's degree (MA or MS) preferably in Education
- Five years successful administrative experience in a school environment
- Experience working in both traditional and innovative school environments
- Experience and training in Montessori methods, arts integration, and/or design thinking
- Experience aligning multiple approaches and best practices into a cohesive and powerful instructional program, building a teacher continuum of instruction specific to Urban Montessori's instructional program, coaching and building capacity of teachers on that continuum, and designing and implementing a professional development system that builds teacher capacity along that continuum and effectively engages teachers as professionals in their own development
- Experience facilitating cycles of data inquiry with teachers to move teacher practice and support teacher action research

**Director of Instruction Qualifications:**

An Urban Montessori Director of Instruction will be responsible for the instructional program of a given band and will support the Head of School to ensure the school and children achieve the outcomes outlined in this charter petition. The Director of Instruction will have the following qualifications:

*Required*

- Minimum five years successful classroom teaching experience in a Montessori setting
- Minimum two years successful experience coaching teachers, developing and implementing teacher training in Montessori methods
- Montessori training and certification
- Able to coach and build capacity of teachers and design and implement a professional development system that builds teacher capacity and effectively engage teachers as professionals in their own development
- Understanding of California State Standards/Common Core and ability to train teachers to map the standards to Montessori curriculum.
- Passion for and experience with data-driven instruction and experience with using data and data systems in a Montessori environment.
- Ability to provide leadership and serve as a mentor, facilitate and manage conflict
- Able to model strong instruction, effective and respectful management of classroom culture, and strong communication skills
- Excellent organization, time management and follow-up skills; high sense of commitment; demonstrated ability to successfully handle multiple projects simultaneously; ability to work as part of a team
- Computer literacy and comfort with acquiring new technology skills

*Preferred*

- Master's degree (MA or MS) preferably in Education
- Strong understanding of the Montessori approach and able to effectively integrate other best practices into the Montessori approach
- Experience managing student interventions systems and developing interventions for struggling students
- Experience using multiple forms of data in facilitating cycles of data inquiry with teachers to move teacher practice and support teacher action research
- Strong understanding of how to use multiple forms of assessment in informing and driving instruction

**Lead Teacher Qualifications:**

An Urban Montessori Lead Teacher will be responsible for leading the implementation of the instructional program in a given class and will work in collaboration with the Elective Teachers, the Director of Instruction, and the Head of School to ensure students in his or her classroom achieve the outcomes outlined in this charter petition.

Education and/or Experience

- Bachelor's degree (BA or BS) from four-year college or university; and at least 3 years of successful teaching in age group assigned in a Montessori classroom
- Montessori certification in the age group/level assigned
- Appropriately credentialed
- CLAD Certification required

*Other Qualifications*

- Strong understanding of Montessori methods and able to effectively integrate other best practices with the Montessori method

- Strong understanding of literacy and math development in children and able to build children’s individual learning plans that identify their zones of proximal development and build upon their understandings and interests
- Strong understanding of instructional strategies outlined in the Urban Montessori Teacher Guidebook; effective and respectful management of classroom culture
- Strong understanding of how to use multiple forms of assessment in informing and driving instruction
- Able to build immediate and loving rapport with children of all ages; strong understanding of child development and adolescent development
- Passion for teaching and working with students from urban communities, with specific knowledge and understanding of the needs of students from different experiences, languages and backgrounds
- Driven adult learner dedicated to his or her own professional growth with an inquiry orientation to his or her own practice
- Able to lead a team and effectively maximize adults and supports in a classroom setting
- Able to provide leadership and serve as a mentor
- Enthusiasm and commitment to participating in a cooperative effort to launch Urban Montessori, with commitment to the vision, mission and guiding principles of the School
- Sense of humor, high ethical professional standards, equity perspective
- Able to work in a creative and demanding learning environment, including the ability to problem-solve and manage ambiguity and adversity
- Excellent communication, presentation and interpersonal skills with demonstrated ability to speak and write clearly and persuasively
- Computer literate and comfortable with acquiring new technology skills
- Excellent organization, time management and follow-up skills; high sense of commitment; ability to work as part of a team
- Able to obtain California Driver's License with a clean DMV printout
- Able to pass state and federal background checks
- Able to obtain First Aid/CPR Certification
- Clear TB and criminal background check upon hire

*Preferred*

- Strong understanding of the Montessori approach and able to effectively integrate other best practices into the Montessori approach
- Experience with student interventions systems and developing interventions for struggling students
- Experience using multiple forms of data in implementing cycles of data inquiry to move practice
- Working knowledge of another language highly preferred, ideally a language spoken by families at Urban Montessori

### **Support Teacher Qualifications:**

An Urban Montessori Support Teacher serves as the support teacher in a traditional Montessori classroom in the morning under a lead Montessori teacher and serves as a lead electives teacher in the afternoon.

#### Education and/or Experience

- Bachelor's degree (BA or BS) from four-year college or university
- Content expertise in foreign language, visual art, music, or design thinking

- At least two years of experience teaching English Language Development, foreign language, visual art, music, or design thinking to k-8 children
- Some experience working in Montessori classrooms or some Montessori training preferred
- Able to build immediate and loving rapport with children of all ages and from diverse backgrounds; some understanding of child growth and development
- Passion for teaching and working with students from urban communities, with specific knowledge and understanding of the needs of students from different experiences, languages and backgrounds
- Excellent organization, time management and follow-up skills; high sense of commitment; ability to work as part of a team
- Excellent communication, presentation and interpersonal skills with demonstrated ability to speak and write clearly and persuasively
- Driven adult learner dedicated to his or her own professional growth with an inquiry orientation to his or her own practice
- Able to work in a creative and demanding learning environment, including the ability to problem-solve and manage ambiguity and adversity
- Enthusiasm and commitment to participating in a cooperative effort to launch Urban Montessori, with commitment to the vision, mission and guiding principles of the School
- Sense of humor, high ethical professional standards, equity perspective
- Computer literate and comfortable with acquiring new technology skills
- Some understanding of instructional strategies outlined in the Urban Montessori Teacher Guidebook; effective and respectful management of classroom culture
- Able to obtain California Driver's License with a clean DMV printout
- Able to pass state and federal background checks
- Able to obtain First Aid/CPR Certification
- Clear TB and criminal background check upon hire

#### *Preferred*

- Some understanding of the Montessori approach and experience in Montessori classrooms
- Working knowledge of another language highly preferred, ideally a language spoken by families at Urban Montessori

### **REQUIRED EDUCATIONAL LEVEL / CREDENTIALING**

Urban Montessori's Lead Teachers will be required to hold ~~athe~~ California Commission on Teacher Credentialing certificate, permit, or other document required for the teacher's certificated assignment~~equivalent to that which a teacher in other public schools would be required to hold~~, in accordance with Education Code section 47605(l), and shall meet requirements under the Every Student Succeeds Act (ESSA) and California state licensure. The School may use local assignment options authorized in statute and regulations for the purpose of legally assigning certificated teachers, in the same manner as a governing board of a school district. Teachers employed by charter schools during the 2019–20 school year shall have until July 1, 2025, to obtain the certificate required for the teacher's certificated assignment. The minimum qualifications for teachers ~~of core, college preparatory subjects~~ are:

- Hold at least a bachelor's degree from an accredited institution of higher education.
- Hold ~~thea~~ Commission on Teacher Credentialing certificate, permit or other document required for the teacher's certificated assignment~~, equivalent to that which a teacher in other public schools would be required to hold.~~ (Education Code Section 47605(l)).

~~The California Charter Schools Act gives charter schools “flexibility with regard to noncore, non-college preparatory courses,” which is applicable to Urban Montessori’s specialty teachers in music, art design and foreign language. As such, the School may also employ non-certificated instructional staff in any case where a prospective staff member has an appropriate mix of subject matter expertise, professional experience, and the demonstrated capacity to work successfully in an instructional capacity in noncore, non-college preparatory courses and activities.~~ Instructional staff will not assign grades or approve student work assignments without the approval of a ~~teacher except in non-core or non-college preparatory courses and activities.~~ All non-instructional staff will possess experience and expertise appropriate for their position within the school.

Urban Montessori will maintain auditable files of teacher credentials on site in compliance with applicable law.

## HUMAN CAPITAL STRATEGY

### Recruitment and Retention

Urban Montessori shall develop a comprehensive recruitment procedures to attract highly-well qualified, credentialed teachers, strong visionary leaders, and exceptional staff. The Urban Montessori recruitment strategies for employing highly-well qualified teachers shall include using established teacher recruiting services, such as EdJoin and Montessori-specific job boards, college employment fairs, posting on educational listservs and networking, as well as developing strategic partnerships.

Urban Montessori is in the process of developing strategic partnerships with Montessori teacher training programs in the Bay Area. These programs will provide teacher interns in the classrooms who will work under the leadership of the lead teachers. The Director of Instruction will work with each Lead Teacher to build a professional development plan for every support teacher and intern to ensure the School is building the capacity of our aides and interns as teachers. The School is committed to developing a career ladders initiative to professionally support and develop the staff in their career planning and to ensure staff members are able to grow and advance within the Urban Montessori organization.

- [Please see Appendix E-1 for Urban Montessori Job Descriptions](#)
- [Please see Appendix E-2 for Urban Montessori Human Capital Plan](#)

### Development

Professional development will be provided on an ongoing basis and will be built into the school calendar. Professional development workshop days include:

- An intensive two-week Summer Institute to review data, map standards, build curriculum units, build interventions plans for struggling children, develop design challenges
- A three-day design thinking training facilitated by the K-12 Lab at the Stanford University Design School
- Weekly two-hour professional development sessions
- Daily teacher collaboration time
- Designated times throughout the term where staff are released to meet with the Director of Instruction around their individual professional growth, observe other classrooms, attend professional development opportunities, and review student growth data
- Other designated whole-group professional development days scheduled throughout the year

- Additional individualized professional development plans developed collaboratively between staff and Director of Instruction

Professional development needs will be assessed through analysis of student assessment data, annual staff surveys, evaluations and observations, and in alignment with the multi-year strategic plan on the implementation of the educational program. Because the staff consists of lead Montessori teachers as well as other specialists who support Montessori instruction in the morning and lead instruction in design, arts, foreign language and/or ELD in the afternoon, professional development will be partially differentiated by role and partially whole-school. All teachers will come together around the following core program elements:

- Cycles of Inquiry
- English Language Development
- Response to Intervention
- School Wide Culture

Otherwise professional development will be highly-differentiated to ensure teachers are receiving the support they need to move their practice.

- [Please see Appendix E-3 for the Professional Development Plan and Calendar](#)

In accordance with Education Code Section 44259.1, which requires that school district teachers in the State of California earn their Professional Clear Credential through on the job mentoring and training, teachers will participate in a California Commission on Teacher Credentialing (“CCTC”) approved Induction Program to earn their Clear Credential. By the completion of the program, educators will have completed a portfolio showing evidence of their professional learning in each of the six Induction standards in the California Standards for the Teaching Profession (“CSTP”) framework.

The School will also continue to pursue strategic partnerships with organizations like the Design School at Stanford University, Alameda County Office of Education, Stanford Redesign Network, Project Zero, Grand Lake Montessori, and others to share best practices around teacher development and leverage specialists in arts integration, performance assessments, Montessori practices, teaching diverse populations, and design thinking.

## EVALUATION

Supervisors will conduct performance reviews with all regular full-time and regular part-time employees annually. Supervisors may conduct informal performance reviews and goal setting sessions more often if they choose. Performance reviews are designed for the supervisor and the employee to discuss his/her current job tasks, encourage and recognize attributes, and discuss positive, purposeful approaches for meeting work-related goals. Together, employee and supervisor discuss ways in which the employee can accomplish goals or learn new skills. The goal setting sessions are designed for the employee and his/her supervisor to make and agree on new goals, skills, and areas for improvement.

- [Please see Appendix E-4 for the Urban Montessori Staff Evaluation Practice](#)

## PERSONNEL POLICIES

The Board will adopt and maintain personnel policies that will be compiled and included in a personnel manual provided to all employees upon commencing employment.

- Please see [Appendix E-5 for the Urban Montessori Employee Handbook](#)

**Element F** of this charter petition provides detail on Health and Safety, **Element K** provides detail on Staff Retirement Systems, **Element M** provides detail on Employee Rights, and the **Assurances** provide detail on Employee Representation.



## ELEMENT F: HEALTH AND SAFETY

Governing Law: The procedures that the charter school will follow to ensure the health and safety of pupils and staff. These procedures shall require all of the following: include the requirement

- (i) That each employee of the charter school furnish the charter school with a criminal record summary as described in Section 44237.
- (ii) The development of a school safety plan, which shall include the safety topics listed in subparagraphs (A) to (J), inclusive, of paragraph (2) of subdivision (a) of Section 32282.
- (i)(iii) That the school safety plan be reviewed and updated by March 1 of every year by the charter school.

- California Education Code Section 47605.6(b)(5)(FG)

In order to provide safety for all children and staff, Urban Montessori maintains a complete guide of health and safety policies and procedures including immunizations, health screenings, administration of medication, a drug free and tobacco free campus and first aid and emergency procedures in case of fire, bomb threat, earthquake, flooding, crash, intrusion, or any other disaster. The health and safety guide is maintained on site and is available for Authorizer review on an ongoing basis. It has been developed in consultation with the School's insurance carriers and risk management experts.

The health and safety policies and procedures are incorporated into the Charter School's Student and Family Handbook, Employee Handbooks, and School Site Safety Plan and are updated on an ongoing basis by the Head of School or designee and adopted annually by the Board of Directors. Urban Montessori shall ensure that staff are trained annually on the health and safety policies.

The following is a summary of the health and safety policies of Urban Montessori.

### PROCEDURES FOR BACKGROUND CHECKS

As required by Education Code Sections 44237 and 45125.1, new employees and contractors as well as non-parent volunteers at the School, must submit two sets of fingerprints to the California Department of Justice for the purpose of obtaining a criminal record summary (LiveScan fingerprinting may be used as an alternative). The Head of School or designee shall monitor compliance with this policy and report to the Urban Montessori Board of Directors on an as needed basis. The Urban Montessori Board Chairman or designee shall monitor the fingerprinting and background clearance of the Head of School. Volunteers who will volunteer outside of the direct supervision of a credentialed employee shall be fingerprinted and receive background clearance prior to volunteering without the direct supervision of a credentialed employee.

### ROLE OF STAFF AS MANDATED CHILD ABUSE REPORTERS

All non-certificated and certificated staff will be mandated child abuse reporters and will follow all applicable reporting laws, the same policies and procedures used by the Authorizer. The School shall provide mandated reporter training to all employees annually.



## **TUBERCULOSIS RISK ASSESSMENT AND EXAMINATION**

Employees and any volunteers with repeated or extended contact with children will be assessed and examined (if necessary)~~tested~~ for tuberculosis using the Mantoux Tuberculin skin test or must provide a negative TB test conducted within the last four years or if tested positive for TB must furnish a certificate from a health provider that s/he is free from communicable TB prior to commencing employment or volunteering as required by Education Code Section 49406. All employees will be retested for TB at least every four years.

## **IMMUNIZATIONS**

All children enrolled and staff will be required to provide records documenting immunizations as is required at public schools pursuant to Health and Safety Code Sections 120325-120375, and Title 17, California Code of Regulations Sections 6000-6075.

## **MEDICATION IN SCHOOL**

Urban Montessori will adhere to Education Code Section 49423 regarding administration of medication in school.

## **EMERGENCY EPINEPHRINE AUTO-INJECTORS**

Urban Montessori shall adhere to Education Code Section 49414 regarding the provision and use of emergency epinephrine auto-injectors by trained office staff or volunteers at school.

## **VISION, HEARING, SCOLIOSIS**

Children will be screened for vision, hearing and scoliosis in accordance with Education Code Section 49450, *et seq.*, as applicable to the grade levels served by Urban Montessori.

## **SUICIDE PREVENTION POLICY**

The Charter School shall maintain a policy on student suicide prevention in accordance with Education Code Section 215. The Charter School shall review, at minimum every fifth year, its policy on pupil suicide prevention and, if necessary, update its policy.

## **PREVENTION OF HUMAN TRAFFICKING**

The Charter School shall identify and implement the most appropriate methods of informing parents and guardians of students in grades 6 through 12 of human trafficking prevention resources.

## **NUTRITIONALLY ADEQUATE FREE OR REDUCED PRICE MEAL**

The Charter School shall provide each needy student, as defined in Education Code Section 49552, with one nutritionally adequate free or reduced-price meal, as defined in Education Code Section 49553(a), during each schoolday.

## **CALIFORNIA HEALTH YOUTH ACT**

The Charter School shall teach sexual health education and human immunodeficiency virus (“HIV”) prevention education to students in grades 7-8, at least, pursuant to the California Healthy Youth Act (Education Code Section 51930, *et seq.*).

## **SCHOOL SAFETY PLAN**

The Charter School shall adopt a School Safety Plan, to be reviewed and updated by March 1 of every year, which shall include identification of appropriate strategies and programs that will provide or maintain a high level of school safety and address the Charter School's procedures for complying with applicable laws related to school safety, including the development of all of the following pursuant to Education Code Section 32282(a)(2)(A)-(J):

- child abuse reporting procedures
- routine and emergency disaster procedures
- policies for students who committed an act under Education Code Section 48915 and other Charter School-designated serious acts leading to suspension, expulsion, or mandatory expulsion recommendations
- procedures to notify teachers of dangerous students pursuant to Education Code Section 49079
- a discrimination and harassment policy consistent with Education Code Section 200
- provisions of any schoolwide dress code that prohibits students from wearing "gang-related apparel," if applicable
- procedures for safe ingress and egress of pupils, parents, and employees to and from the Charter School
- a safe and orderly environment conducive to learning
- the rules and procedures on school discipline adopted pursuant to Education Code Sections 35291, 35291.5, 47605, and 47605.6
- procedures for conducting tactical responses to criminal incidents

## **EMERGENCY PREPAREDNESS**

Urban Montessori shall adhere to an Emergency Management Plan drafted specifically to the needs of the school sites in conjunction with law enforcement and the Fire Marshall. This plan shall include, but not be limited to the following responses: fire, flood, earthquake, terrorist threats, and hostage situations. If utilizing facilities that were previously used as a school site, any existing emergency preparedness plan for the school site shall be used as a starting basis for updating the plan for Urban Montessori.

## **BLOOD BORNE PATHOGENS**

Urban Montessori shall meet state and federal standards for dealing with blood borne pathogens and other potentially infectious materials in the work place. The Board of Directors shall establish a written infectious control plan and provide training to staff to protect employees and children from possible infection due to contact with blood borne viruses, including human immunodeficiency virus (HIV) and hepatitis B virus (HBV). Whenever exposed to blood or other bodily fluids through injury or accident, children and staff should follow current medical protocol for disinfecting procedures.

## **DRUG FREE/ALCOHOL FREE/SMOKE FREE ENVIRONMENT**

Urban Montessori shall function as a drug, alcohol and tobacco free workplace.

## **FACILITY SAFETY**

Urban Montessori shall utilize facilities that are compliant with the Americans with Disabilities Act and will meet the building requirements described in Education Code 47610-47610.5. Urban Montessori agrees to test sprinkler systems, fire extinguishers, and fire alarms annually at its facilities to ensure

that they are maintained in an operable condition at all times. The School shall conduct fire drills as required under Education Code Section 32001.

### **BULLYING PREVENTION**

The Charter School shall adopt procedures for preventing acts of bullying, including cyberbullying. The Charter School shall annually make available the online training module developed by the CDE pursuant to Education Code Section 32283.5(a) to certificated schoolsite employees and all other schoolsite employees who have regular interaction with children.

### **COMPREHENSIVE ANTI-DISCRIMINATION AND SEXUAL HARASSMENT POLICIES AND PROCEDURES**

Urban Montessori is committed to providing schools that are free from discrimination and sexual harassment, as well as any harassment based upon such factors as race, religion, creed, color, gender, gender identity, gender expression, nationality, national origin, ancestry, age, medical condition, marital status, sexual orientation, pregnancy, physical or mental disability, childbirth or related medical conditions, or on the basis of a person's association with a person or group with one or more of these actual or perceived characteristics, or any other basis protected by federal, state, local law, ordinance or regulation. Urban Montessori will adopt the Authorizer's comprehensive policy to prevent and immediately remediate any concerns about discrimination, sexual discrimination, or harassment at Urban Montessori (including employee to employee, employee to student, and student to employee misconduct). Misconduct of this nature is very serious and will be addressed in accordance Urban Montessori sexual harassment policy, included in the Employee Handbook. A copy of the policy shall be provided as part of any orientation program conducted for new and continuing pupils at the beginning of each quarter, semester, or summer session, as applicable, and to each faculty member, all members of the administrative staff, and all members of the support staff at the beginning of the first quarter or semester of the school year, or at the time that there is a new employee hired. The Charter School shall create a poster that notifies students of the applicable policy on sexual harassment in accordance with Education Code Section 231.6, and shall prominently and conspicuously display the poster in each bathroom and locker room at the schoolsite and in public areas at the schoolsite that are accessible to, and commonly frequented by, pupils.

- Please see Appendix F-1 for the Urban Montessori Health and Safety Manual, which includes the Urban Montessori Emergency Plan
- Please see Appendix F-2 for the Urban Montessori Uniform Complaint Policy

## ELEMENT G: RACIAL AND ETHNIC STUDENT POPULATION BALANCE

Governing Law: The means by which the charter school will achieve a balance of racial and ethnic balance among its pupils, special education pupils, and English learner pupils, including redesignated fluent English proficient pupils, as defined by the evaluation rubrics in Section 52064.5, that is reflective of the general population residing within the territorial jurisdiction of the school district to which the charter petition is submitted. Upon renewal, for a charter school not deemed to be a local educational agency for purposes of special education pursuant to Section 47641, the chartering authority may consider the effect of school placements made by the chartering authority in providing a free and appropriate public education as required by the federal Individuals with Disabilities Education Act (Public Law 101-476), on the balance of pupils with disabilities at the charter school.

- California Education Code Section 47605.6(b)(5)(GH)

Urban Montessori conducts a variety of outreach activities to attract an applicant pool to achieve a balance of racial and ethnic students, special education students, and English Learners that broadly reflects of the general population residing within the territorial jurisdiction of the racial and ethnic balance of Oakland Unified School District. These strategies include, but are not limited to:

1. Participating in the Oakland Unified School District's common enrollment process, Enroll Oakland Charters (EOC)
2. Establishing an enrollment timeline and process that allows for a broad-based recruiting and application process. Typically, formal outreach activities for the following school year's enrollment begin in November, and the lottery is held in March.
3. Creating and distributing enrollment brochures and forms in various languages, including English and Spanish.
4. Meetings with and presentations to local pre-schools and Head Start programs, parent groups, neighborhood groups, community organizations, churches, and youth service organizations.
5. Posting enrollment information on the website in multiple languages
6. Hosting Montessori 101 workshops in target communities where families have less exposure to and understanding of the Montessori model
7. Holding open houses and hosting scheduled tours for interested parents. During open enrollment season, the School will typically have 2-3 open houses per neighborhood.
8. Advertising openings by posting flyers in neighborhoods, distributing flyers at local grocery stores, buying ad space on buses or in the newspaper, and sending information via direct mail.

The office manager plays a key role in fielding calls about enrollment, coordinating open houses and presentations, and assisting individual families to fill out the Interest Form.

Urban Montessori Charter School recognizes that the Montessori model may be more known and desired by families who have had access to predominantly private Montessori preschools. The School is therefore committed to doing extensive outreach to communities that may have not had experience with Montessori and organizing a virtual tour of a Montessori classroom as part of our outreach to ensure families with less exposure to Montessori can make thoughtful choices.

- Please see [Appendix A-1 for the Urban Montessori Outreach Plan](#)

## ELEMENT H: ADMISSION REQUIREMENTS POLICIES AND PROCEDURES

Governing Law: Admission policies and procedures, consistent with [Education Code Section 47605] subdivision (e). requirements, of the charter school, if applicable.

- California Education Code Section 47605-6(bc)(5)(MH)

Urban Montessori is open to all children. The School makes the following assurances regarding admissions:

- The School will enroll all pupils who wish to attend to the extent that space allows.
- The School will be an open enrollment, tuition-free public school with no specific requirements for admission (e.g., minimum grade point average, test scores, discipline records, etc.) as outlined in Education Code § 47605(ed)(2)(A). No test or assessment shall be administered to students prior to acceptance and enrollment into the school.
- The School will comply with all laws establishing minimum and maximum age for public school attendance.
- The School is committed to providing a safe, discrimination-free and harassment-free education to its children.
- The School will be nonsectarian in its programs, admission policies, and all other operations.
- The School will not charge tuition.
- The School shall not discriminate against any pupil on the basis of the characteristics listed in Education Code Section 220 (actual or perceived disability, gender, gender identity, gender expression, nationality, race or ethnicity, religion, sexual orientation, or any other characteristic that is contained in the definition of hate crimes set forth in Section 422.55 of the Penal Code, including immigration status, or association with an individual who has any of the aforementioned characteristics).
- The School shall comply with all applicable legal minimum and maximum age requirements for admission.
- The Charter School will ensure that all application materials provide complete information regarding application procedures, key dates, and admissions preferences and requirements consistent with approved charter.
- Admission to the School shall not be determined according to the student's place of residence or that of his or her parent or guardian, within the state of California, except as provided below.

While admission tests will not be required prior to acceptance and enrollment in school, assessments will be administered to determine individual instructional programs once children are admitted. These tests will serve as diagnostics of children's reading, writing and math skills.

In accordance with Education Code Section 47605(e)(4)(A), the Charter School shall not discourage a pupil from enrolling or seeking to enroll in the charter school for any reason, including, but not limited to, academic performance of the pupil or because the pupil exhibits any of the characteristics described in Education Code Section 47605(e)(2)(B)(iii), including pupils with disabilities, academically low-achieving pupils, English learners, neglected or delinquent pupils, homeless pupils, or pupils who are economically disadvantaged, as determined by eligibility for any free or reduced-price meal program, foster youth, or pupils based on nationality, race, ethnicity, or sexual orientation. Similarly, in accordance with Section 47605(e)(4)(C), the Charter School shall not encourage a pupil currently attending the Charter School to disenroll from the Charter School or transfer to another school for any reason, including, but not limited to the academic performance of the pupil or because the pupil exhibits any of the characteristics described in Education Code Section 47605(e)(2)(B)(iii), as listed above.

Pursuant to Education Code Section 47605(e)(4)(D), the Charter School shall post a notice developed by the CDE on the Charter School website, outlining the requirements of Section 47605(e)(4), and make this notice available to parents.

In accordance with Education Code Sections 49011 and 47605(e)(2)(B)(iv), admission preferences shall not require mandatory parental volunteer hours as a criterion for admission or continued enrollment.

## **STUDENT RECRUITING AND ENROLLMENT GROWTH**

Urban Montessori will use a variety of strategies to actively recruit a diverse student population who understand and value the Charter School's mission and are committed to the School's instructional and operational philosophy. Participation in Enroll Oakland Charters common application process has been added as a key strategy.

Urban Montessori, as part of Enroll Oakland Charters, commits to participation in a common application and timeline that ensures equitable access to educational opportunities for all students of all demographic backgrounds and academic abilities. Urban Montessori will utilize only the Enroll Oakland Charters application and align enrollment timelines with Enroll Oakland Charters enrollment due dates (i.e. application and confirmation dates). The School in conjunction with Enroll Oakland Charters commits to establishing recruitment and enrollment strategies that will support achieving a student demographic that is aligned to the demographics of Oakland. The Enroll Oakland Charters application will be available in nine different languages and accessible both online and in paper. Urban Montessori will partner with Enroll Oakland Charters and Oakland Unified School District to ensure that all families are aware of, and able to, access enrollment and a Free and Appropriate Public Education.

The school will maintain a waiting list to ensure the school will meet enrollment goals. It is the goal of Urban Montessori to serve the general student population of Oakland, and the school will strive to achieve a racial and ethnic balance that will reflect the general population residing in the territorial jurisdiction of the Oakland Unified School District and the demographics of the local traditional public schools, consistent with California Education Code section 47605(~~ee~~)(1).

Urban Montessori and Enroll Oakland Charters will engage in extensive community outreach and advertising to help inform families about Oakland's School Finder tool and the Enroll Oakland Charter common application. These efforts may include, but are not limited to:

- Public presentations at local community organizations
- Collateral materials - flyers, posters, Oakland charter school map, etc.
- Tabling and pop-up events in the community
- Public website
- Outdoor advertising
- Family-facing resource center
- Earned media
- Social media campaigns
- Charter school fair

Urban Montessori served grades TK through 6th in 2016-17 and continue its growth to serve TK through 8th grade by enrolling two new classes of Kindergarten children each year over the first two years of the new charter term until full capacity of 681 children is reached. The continuation of this



“slow growth” plan will:

- Maximize the portion of children who enter a Montessori setting early enough to fully benefit from the Montessori approach which was designed explicitly for children starting at age three and continuing minimally through the second elementary program,
- Enable the School to bring on staff gradually, and ensure selection of the most qualified teachers,
- Allow time for smoother orientation and integration of new teachers into the program,
- Facilitate the development of a close-knit school community,
- Spread the cost of acquiring furniture and equipment and curriculum development over many years, and
- Give teachers time to gradually build a fully-articulated K-8 curriculum.

**ADMISSIONS AND ENROLLMENT TIMELINE**

Urban Montessori is participating in the Enroll Oakland Charters application process, including the use of a common application and timeline. The Enroll Oakland Charters application is available online and in paper, and translated into nine different languages. The estimated application, public random drawing, and admission schedule and process is provided in the figure below, and may be amended by the School as necessary to align with the EOC timeline and school needs. The final schedule and due dates will be communicated to interested parents and students on the School’s website. It is anticipated that this timeline will remain the same, but it may change over time. It may be amended without any need to formally materially revise the charter as long as changes are communicated to the ACOE and are posted on the School’s website.

Month	Process
November - February	Recruitment events, bilingual information sessions, meetings with family groups, home visits, school tours
November - February	Open Enrollment Period. Online application form available on Enroll Oakland Charters website and in paper at school administrative office and EOC website.
January - February	Distribution and completion of Intent to Re-enroll Forms. Determination of current students who are returning.
Mid February	All application forms due via Enroll Oakland Charters
Mid March	Public random drawing conducted (if necessary). Admission status notification distributed to applicants via School Mint notification.
March 30th	Student enrollment confirmations due
March - June	Enrollment seminars and Community Gatherings to engage accepted families
June - August	Family and student orientations held

During the application window, Urban Montessori will have the opportunity to communicate with applicants to better inform them about the school's program, this may include but isn't limited to optional information sessions, school tours, and open houses. Following the application deadline, Urban Montessori will use a similar application for interested families to apply for Urban Montessori's waitlist.

## APPLICATION AND ADMISSIONS PROCESS

Application to Urban Montessori Charter School shall be completed via Enroll Oakland Charters, either online or by paper and returned to the School no later than the published deadline published to be included in the random public lottery. In order to maximize access to Urban Montessori Charter School, the application will request minimal information. Applications will be available online in English and Spanish. The online application will be available in Vietnamese, Arabic, Simplified Chinese, Traditional Chinese, Khmer, Tagalog, and Tigrinya in the near future. The paper application is available in English and can be picked up at the school site or the EOC office. Urban Montessori will offer assistance in completing the application should families request it.

All children who wish to attend Urban Montessori Charter School shall be admitted, up to capacity. Admission to Urban Montessori Charter School shall not be determined by the place of residence of the student or his or her parent in the State, except as provided in Education Code Section 47605~~(ee)~~(1)-(2).

Families who submit completed application forms prior to the deadline will be notified regarding the date, time, and location of the public lottery, and rules for the lottery process. Parents do not have to be present to participate in the lottery. Urban Montessori will ensure that the lottery process will be:

- Public, transparent and fair
- Held in a public space large enough to accommodate all interested
- Facilitated by an uninterested party charged with conducting the process

All applications drawn after reaching capacity will be placed on a waitlist, in the order in which they are drawn. The School will communicate lottery results, and families of students who are offered admission will have until March 30th to accept or decline their seat. Urban Montessori may request, at the time of, and as part of, conducting its lottery process, the provision of information necessary to apply specific admissions preferences set forth in this Charter. The School will communicate regarding the necessary documentation required to verify application information, such as proof of age and proof of address.

If the number of children who wish to attend an Urban Montessori school exceeds that school's capacity, admission, except for existing children of Urban Montessori Charter School, shall be determined by a public random drawing. In the case of a public random drawing, the following categories of children will be exempt from the public random drawing:

1. Currently enrolled children
2. Children of Urban Montessori Charter School founders, not to exceed 10% of total enrollment
3. Siblings of children currently enrolled in Urban Montessori Charter School
4. Children of full time Urban Montessori Charter School staff

If space is not available for all exempt applicants, admission will be offered in this order:

1. Children with multiple exemptions with ranked priority given to the children with the greatest number of exemptions
2. Siblings of children currently enrolled at Urban Montessori
3. Children of full time Urban Montessori Staff
4. Children of Urban Montessori founders



As part of the public random drawing, the following categories will receive weighted preference for admission to the school:

1. Children seeking to change schools under the public school choice provisions of ESSA (if any), one additional lottery number will be assigned for this preference.
2. Children of Urban Montessori Charter School Board Members after two years of service on the Board; ten additional lottery numbers will be assigned for this preference.
3. Children residing within the boundaries of Oakland Unified School District; one additional lottery number will be assigned for this preference.

All applications drawn after reaching capacity will be placed on a wait-list according to their draw in the lottery. This wait list will allow students the option of enrollment in the case of an opening during the current school year. Any families who decline admission or who fail to confirm will lose their position to the next name on the waiting list. The waiting list will be kept on file at the school and will be valid for the duration of the school year. If a student leaves the school, that space may be offered to the next person on the waiting list. In no circumstance will await list carry over to the following school year.

Public random drawing rules, deadlines, dates and times will be communicated in the application form and on the Charter School website. Public notice for the date and time of the public random drawing will also be posted once the application deadline has passed. The Charter School will also inform parents of all applicants and all interested parties of the rules to be followed during the public random drawing process via mail or email at least two weeks prior to the lottery date.

## ENROLLMENT

Once a child has been offered a seat at Urban Montessori, families will be required to complete the registration process which will minimally require families provide the following:

- Completion of a student registration form;
- Proof of Immunization;
- Home Language Survey;
- Completion of Emergency Medical Information Form;
- Proof of minimum and maximum age requirements, e.g. birth certificate;
- Authorization for the school to request and receive student records from schools the student has attended or is currently attending<sup>19</sup>;
- A copy of any existing Student Success Team (SST) evaluations and recommendations for the student shall be provided;
- A copy of any existing 504 or Individual Education Plan (IEP) for the student shall be provided.

## ORIENTATION

Upon admission, families will be encouraged to attend a family orientation. Every family that enrolls in Urban Montessori will have an individualized orientation/intake meeting to review all enrollment documentation, welcome and learn about the child and the family joining the Urban Montessori community and the assets they bring to the community, address any questions and concerns, and ensure Urban Montessori has sufficient student information to begin developing an initial individualized learning plan. All newly enrolled students and families are encouraged to attend and

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<sup>19</sup> The Charter School shall not request a pupil's records or require a parent, guardian, or pupil to submit the pupil's records to the Charter School before enrollment.

orientation before the first day of school to acclimate them to the environment, meet their teachers and become familiar with the daily routine.

## ELEMENT I: ANNUAL FINANCIAL AUDITS

*Governing Law: The manner in which annual, independent, financial audits shall be conducted, in accordance with regulations established by the state board, and the manner in which audit exceptions and deficiencies shall be resolved.*

- California Education Code Section 47605.6(b)(5)(I)

An annual independent fiscal audit of the books and records of the School will be conducted as required under the Schools Act, Education Code Sections 47605.6(b)(5)(I) and 47605.6(m). The books and records of the School will be kept in accordance with generally accepted accounting principles, and as required by applicable law and the audit will employ generally accepted accounting procedures. The audit shall be conducted in accordance with applicable provisions within the California Code of Regulations governing audits of Schools as published in the State Controllers Guide.

The Treasurer of the Board of the School will select an independent auditor and will be responsible for overseeing the independent audit. The auditor will have, at a minimum, a CPA and educational institution audit experience and be approved by the State Controller on its published list as an educational audit provider. To the extent required under applicable federal law, the audit scope will be expanded to include items and processes specified in applicable Office of Management and Budget Circulars.

The annual audit will be completed within four months of the close of the fiscal year and a copy of the auditor's findings will be forwarded to the County Superintendent, the State Controller, and to the CDE by the 15th of December of each year. The Board of Directors will review any audit exceptions or deficiencies and develop a plan to resolve them. The School will submit a report to the County proposing how the exceptions and deficiencies have been or will be resolved to the satisfaction of the County along with an anticipated timeline for the same. Any disputes between the County and the School regarding the resolution of audit exceptions and deficiencies will be referred to the dispute resolution process referenced in Section V of this Charter. The independent fiscal audit of the School is a public record to be provided to the public upon request.

## ELEMENT J: SUSPENSION AND EXPULSION

*Governing Law: The procedures by which pupils can be suspended or expelled from the charter school for disciplinary reasons or otherwise involuntarily removed from the charter school for any reason. These procedures, at a minimum, shall include an explanation of how the charter school will comply with federal and state constitutional procedural and substantive due process requirements that is consistent with all of the following:*

- (i) For suspensions of fewer than 10 days, provide oral or written notice of the charges against the pupil and, if the pupil denies the charges, an explanation of the evidence that supports the charges and an opportunity for the pupil to present the pupil's side of the story.*
- (ii) For suspensions of 10 days or more and all other expulsions for disciplinary reasons, both of the following:*
  - (I) Provide timely, written notice of the charges against the pupil and an explanation of the pupil's basic rights.*
  - (II) Provide a hearing adjudicated by a neutral officer within a reasonable number of days at which the pupil has a fair opportunity to present testimony, evidence, and witnesses and confront and cross-examine adverse witnesses, and at which the pupil has the right to bring legal counsel or an advocate.*
- (+)(iii) Contain a clear statement that no pupil shall be involuntarily removed by the charter school for any reason unless the parent or guardian of the pupil has been provided written notice of intent to remove the pupil no less than five school days before the effective date of the action. The written notice shall be in the native language of the pupil or the pupil's parent or guardian or, if the pupil is a foster child or youth or a homeless child or youth, the pupil's educational rights holder, and shall inform the pupil, the pupil's parent or guardian, or the pupil's educational rights holder of the right to initiate the procedures specified in clause (ii) before the effective date of the action. If the pupil's parent, guardian, or educational rights holder initiates the procedures specified in clause (ii), the pupil shall remain enrolled and shall not be removed until the charter school issues a final decision. For purposes of this clause, "involuntarily removed" includes disenrolled, dismissed, transferred, or terminated, but does not include suspensions specified in clauses (i) and (ii).*

- California Education Code Section 47605-6(~~bc~~)(5)(J)

## APPROACH TO DISCIPLINE

Urban Montessori Charter School is committed to ensuring that the School's culture and discipline policies are in alignment with child development research. The School will establish a school-wide behavior plan that makes expectations for student behavior clear and describes consistent and escalating consequences for inappropriate behavior. This plan will be distributed to families and children, and children will be taught the elements of the plan. Urban Montessori will implement a comprehensive interventions system to ensure children who require behavioral intervention or social-emotional supports receive interventions targeted toward improving children's performance academically, socially, emotionally, and physically. In addition, the School will implement a Character and Peace curriculum to ensure all children are being explicitly taught the habits and self-management strategies needed to engage effectively as part of a community.

## SUSPENSION AND EXPULSIONS

Should a child's inappropriate behavior escalate or be severe enough to warrant suspension or expulsion, the procedures for suspension and expulsion of the School's children are based on the procedures identified in the California Education Code. The policies and procedures for suspension and expulsion will be periodically reviewed and the list of offenses for which children are subject to suspension and expulsion will be modified as necessary. The School will notify the County of any expulsions. The School will account for suspended or expelled children in its average daily attendance accounting as provided by law.

- Please see Appendix J-1 for the Urban Montessori School Discipline Plan that outlines the School's Suspension and Expulsion policies and procedures, including the homework policy for students suspended for less than five days
- Please see Appendix J-2 for the Urban Montessori Student and Family Handbook

## INVOLUNTARY REMOVAL

No student shall be involuntarily removed by the Charter School for any reason unless the parent or guardian of the student has been provided written notice of intent to remove the student no less than five schooldays before the effective date of the action. The written notice shall be in the native language of the student or the student's parent or guardian or, if the student is a foster child or youth or a homeless child or youth, the student's educational rights holder, and shall inform him or her of the basis for which the pupil is being involuntarily removed and his or her right to request a hearing to challenge the involuntary removal. If a parent, guardian, or educational rights holder requests a hearing, the Charter School shall utilize the same hearing procedures specified in the Suspension and Expulsion policies and procedures for expulsions, before the effective date of the action to involuntarily remove the student. If the student's parent, guardian, or educational rights holder requests a hearing, the student shall remain enrolled and shall not be removed until the Charter School issues a final decision. As used herein, "involuntarily removed" includes disenrolled, dismissed, transferred, or terminated, but does not include removals for misconduct which may be grounds for suspension or expulsion as enumerated in the Suspension and Expulsion policies and procedures.

## SAFEGUARDS

In the case of a special education student, or a student who receives 504 accommodations, the School will ensure that it makes the necessary adjustments to comply with the mandates of state and federal laws, including the IDEIA and Section 504 of the Rehabilitation Plan of 1973, regarding the discipline of children with disabilities. Prior to recommending expulsion for a Section 504 student or special education student, the charter administrator will convene a review committee to determine 1) if the conduct in question was caused by, or had a direct and substantial relationship to the child's disability; or 2) if the conduct in question was the direct result of the LEA's failure to implement the 504 plan or IEP. If it is determined that the student's misconduct was not caused by or had direct and substantial relationship to the child's disability or the conduct in question was not a direct result of the LEA's failure to implement the 504 plan or IEP, the student may be expelled.

## ELEMENT K: STAFF RETIREMENT SYSTEMS

Governing Law: *The manner by which staff members of the charter school will be covered by the State Teachers' Retirement System, the Public Employee's Retirement System, or federal social security.*

- *California Education Code Section 47605-~~6~~(cb)(5)(K)*

Urban Montessori will structure its employee compensation plan in a manner that will attract candidates with the necessary skills and experience.

All employees of the School who qualify for membership in STRS (including teachers and other qualified certificated employees) shall be covered under the appropriate system. Employees will contribute at the rate established by STRS. The School will work with the County Office of Education pursuant to Education Code Section 47611.3 to ensure that appropriate arrangements for the coverage have been made. All employees who are not members of STRS must contribute to the federal social security system. The School will make all employer contributions as required by STRS and federal social security. The School will also make contributions for workers' compensation insurance, unemployment insurance and any other payroll obligations of an employer. The Head of School or designee will be responsible for arranging retirement benefits.

## ELEMENT L: ATTENDANCE ALTERNATIVES

Governing Law: *The public school attendance alternatives for pupils residing within the school district~~county~~ who choose not to attend ~~the~~ charter schools.*

- *California Education Code Section 47605-~~6~~(~~bc~~)(5)(~~LN~~)*

No student may be required to attend Urban Montessori Charter School. Children who reside within the school district in which the School operates who choose not to attend the School may attend a school within that school district according to its policy or at another school district or school within the district through its intra- and inter-district transfer policies. The parent or guardian of each student enrolled in the School shall be notified on admissions forms that the student(s) has no right to admission in a particular school of any local educational agency (or program of any local educational agency) as a consequence of enrollment in the School, except to the extent that such a right is extended by the local educational agency.

**ELEMENT M: DESCRIPTION OF EMPLOYEE RIGHTS**

Governing Law: ~~The rights of any employee of the county office of education school district, upon leaving the employment of the school district county office of education, to work in a to be employed by the charter school, and of any rights of return to the school district county office of education that an employee may have upon leaving the after employment at a of the charter school.~~

- California Education Code Section 47605-6(b)(5)(M)

No person shall be required to work at the School. Persons employed by Urban Montessori are not considered employees of Alameda County Office of Education for any purpose whatsoever. Employees of the County who resign from County employment to work at Urban Montessori and who later wish to return to the County shall be treated the same as any other former County employee seeking reemployment under the collective bargaining contracts of ACOE, which shall govern. Urban Montessori shall not have any authority to confer any rights to return on County employees. Sick or vacation leave or years of service credit at the County or any other school district will not be transferred to Urban Montessori. Employment by Urban Montessori provides no rights of employment at any other entity, including any rights in the case of closure of Urban Montessori.



## ELEMENT N: DISPUTE RESOLUTION PROCESS

Governing Law: The procedures to be followed by the Charter School and the chartering authority ~~county board of education~~ to resolve disputes relating to provisions of the charter

- California Education Code Section 47605.6(b)(5) ~~(NL)~~

### INTENT

The intent of the Urban Montessori Dispute Resolution Process is to:

- Resolve disputes within the School pursuant to the School's policies.
- Minimize the oversight burden on the county.
- Ensure a fair and timely resolution to disputes.

Should any section of this element pertaining to resolving disputes, be in conflict with County policies or desired protocols, then the School is amenable to altering said areas through the Memorandum of Understanding process to be mutually agreed upon.

### DISPUTES BETWEEN THE AUTHORIZER AND THE CHARTER SCHOOL

The School recognizes that it cannot bind the County to a dispute resolution procedure to which the County does not agree. The policy below is intended as a starting point for a discussion of dispute resolution procedures. The School is willing to consider changes to the process outline below as suggested by the County.

The School and the County will be encouraged to attempt to resolve any disputes with the County amicably and reasonably without resorting to formal procedures. In the event of a dispute between the School and the County, School staff, employees and Board members of the School and the County agree to first frame the issue in written format (“dispute statement”) and to refer the issue to the County Superintendent and Head of School of the Urban Montessori school in dispute. In the event that the County Board of Trustees believes that the dispute relates to an issue that could lead to revocation of the charter in accordance with Education Code Section 47607, the School requests that this shall be noted in the written dispute statement, although it recognizes it cannot legally bind the County to do so. However, participation in the dispute resolution procedures outlined in this section shall not be interpreted to impede or act as a pre-requisite to the County’s ability to proceed with revocation in accordance with Education Code Section 47607.

The Head of School and Superintendent shall informally meet and confer in a timely fashion to attempt to resolve the dispute, not later than 5 business days from receipt of the dispute statement. In the event that this informal meeting fails to resolve the dispute, both parties shall identify two Board members from their respective boards who shall jointly meet with the Superintendent and the Head of School of the school in dispute and attempt to resolve the dispute within 15 business days from receipt of the dispute statement.

If this joint meeting fails to resolve the dispute, the Superintendent and the Head of School shall meet to jointly identify a neutral third party mediator to engage the Parties in a mediation session designed

to facilitate resolution of the dispute. The format of the mediation session shall be developed jointly by the Superintendent and the Head of School. Mediation shall be held within sixty business days of receipt of the dispute statement. The costs of the mediator shall be split equally between the County and the School. If mediation does not resolve the dispute either party may pursue any other remedy available under the law. All timelines and procedures in this section may be revised upon mutual written agreement of the County and the School.

### **ADDRESSING INTERNAL CONCERNS AND COMPLAINTS**

Urban Montessori is committed to working with all stakeholders to address any concerns and complaints. Disputes arising from within the Charter School, including all disputes among and between students, staff, parents, volunteers, advisors, partner organizations, and Charter School Board members, shall be resolved pursuant to policies and processes developed by the Charter School, including, but not limited to, the adopted Uniform Complaint Procedures of the Charter School.

All stakeholders are encouraged to share their ideas and concerns with the Head of School at any time. If the Head of School is unable to resolve a concern, all stakeholders are able to contact the Chair of the Board of Directors. The Uniform Complaint process will be used as needed to address any community concerns that are not resolved through informal conversations.

The School will establish and communicate through parent and employee handbooks the complaint procedures that address both complaints alleging discrimination or violations of law and complaints regarding other areas. The School will not, at any time, refer internal complaints to the County.

- [Please see Appendix F-3 for the Urban Montessori Uniform Complaint Procedures](#)

## ELEMENT O. CLOSURE PROCEDURES

Governing Law: *The procedures to be used if the charter school closes. The procedures shall ensure a final audit of the charter school to determine the disposition of all assets and liabilities of the charter school, including plans for disposing of any net assets and for the maintenance and transfer of pupil~~public~~ records.*

- California Education Code Section 47605-~~6~~(bc)(5)(OP)

Closure of Urban Montessori will be documented by official action of the Board of Directors. The action will identify the reason for the closure. The official action will also identify an entity and person or persons responsible closure-related activities.

The Board of Directors or its designee will promptly notify parents and children of the school, the County Office of Education, the School's SELPA, retirement systems in which the School's employees participate (e.g., State Teachers' Retirement System, and federal social security), and the California Department of Education of the closure as well as the effective date of the closure. This notice will also include the name(s) of contact information for the person(s) to whom reasonable inquiries may be made regarding the closure; the pupils' school districts of residence; and the manner in which parents/guardians may obtain copies, including specific information on completed courses and credits that meet graduation requirements.

The Board or its designee will ensure that the notification to the parents and children of the site of the closure provides information to assist parents and children in locating suitable alternative programs. This notice will be provided promptly following the Board's decision to close the School.

The Board will also develop a list of pupils in each grade level and the classes they have completed, together with information on the pupils' districts of residence, which they will provide to the entity responsible for closure-related activities.

As applicable, the School will provide parents, children and the County with copies of all appropriate student records and will otherwise assist children in transferring to their next school. All transfers of student records will be made in compliance with the Family Educational Rights and Privacy Act ("FERPA") 20 U.S.C. § 1232g. The School will ask the County to store original records of School children. All records of the school shall be transferred to the County upon site closure. If the County will not or cannot store the records, the School shall work with the County to determine a suitable alternative location for storage.

All state assessment results, special education records, and personnel records will be transferred to and maintained by the entity responsible for closure-related activities in accordance with applicable law.

As soon as reasonably practical, the School will prepare final financial records. The School will also have an independent audit completed within six months after closure. The School will pay for the final audit. The audit will be prepared by a qualified Certified Public Accountant selected by the School and will be provided to the County promptly upon its completion. The final audit will include an accounting of all financial assets, including cash and accounts receivable and an inventory of property, equipment, and other items of material value, an accounting of the liabilities, including accounts payable and any reduction in apportionments as a result of audit findings or other investigations,

loans, and unpaid staff compensation, and an assessment of the disposition of any restricted funds received by or due to the School.

The School will complete and file any annual reports required pursuant to Education Code section 47604.33.

On closure of the School, all assets of the School, including but not limited to all leaseholds, personal property, intellectual property and all ADA apportionments and other revenues generated by children attending the School, remain the sole property of the School and shall be distributed in accordance with the Articles of Incorporation to another California public educational entity. Any assets acquired from the County or County property will be promptly returned upon school closure to the County. The distribution shall include return of any grant funds and restricted categorical funds to their source in accordance with the terms of the grant or state and federal law, as appropriate, which may include submission of final expenditure reports for entitlement grants and the filing of any required Final Expenditure Reports and Final Performance Reports, as well as the return of any donated materials and property in accordance with any conditions established when the donation of such materials or property was accepted.

On closure, the School shall remain solely responsible for all liabilities arising from the operation of Urban Montessori. As the School is operated by a non-profit public benefit corporation, should the corporation dissolve, the Board will follow the procedures set forth in the California Corporations Code for the dissolution of a non-profit public benefit corporation and file all necessary filings with the appropriate state and federal agencies. As specified by the Budget in the Appendix, the School will utilize the reserve fund to undertake any expenses associated with the closure procedures identified above.

## SUPPLEMENTAL INFORMATION

### FINANCIAL PLAN

#### Budgets and Cash Flow

Governing Law: The petitioner or petitioners ~~shall~~ also shall be required to provide financial statements that include a proposed first-year operational budget, including startup costs, and cash flow and financial projections for the first three years of operation.

- California Education Code Section 47605.6(h)

At full enrollment, the School will be able to sustain itself on state and federal per-pupil funds, without the need for additional grant monies.

#### Sources of Funds

The vast majority of funds for the School's operations come from the State of California and local in-lieu of property taxes, in the form of a per-student standard allocation (Revenue Limit Per Average Daily Attendance, or "ADA"). The School will also receive additional monies ("categorical funds") for special populations and specific programs.

#### Uses of Funds

Annually, most of the School's funds will go toward personnel and facilities (including rent or debt service, utilities and maintenance). The School also anticipates spending about 5% of its budget on other direct program costs (e.g. classroom supplies).

- [Please see Appendix Misc-1 for the Urban Montessori Budget](#)
- [Please see Appendix Misc-2 for the Urban Montessori Cash Flow](#)
- [Please see Appendix Misc-3 for the Urban Montessori Budget Narrative](#)

These materials are provided as required by Education Code Section 47605.6(h) and are based upon the best data available to the Petitioners at the date of submission.

#### Direct Funding

The School will receive funding pursuant to Education Code Section 47630 et seq. and will opt to receive its funding directly from the state pursuant to Education Code Section 47651. Any funds due to the School that flow through the County shall be forwarded to the School in a timely fashion. During the term of this charter petition, the School and the County will negotiate in good faith to develop a Memorandum of Understanding that establishes the specific financial and service relationship between the two parties.

#### Financial Reporting

By July 1 of each calendar year, the School will provide a draft budget for the following school year to the County, including its estimate for enrollment and its Average Daily Attendance assumptions. The School shall comply with all other financial reports required by Education Code Section 47604.33,

including submitting the first interim by December 15, 2<sup>nd</sup> interim by March 15, unaudited actuals by September 15, and final audit by December 15.

The School will maintain sufficient staff and systems including technology, required to ensure timely reporting necessary to comply with the law and to meet all reasonable inquires from County and other authorized reporting agencies.

**Insurance**

The School shall acquire, maintain and finance general liability, workers compensation, and other necessary insurance for the School of the types and in the amounts required for an enterprise of similar purpose and circumstance.

The School shall provide evidence of the above insurance coverage to the County no later than sixty days prior to operation or an earlier agreed upon date by the County and the School.

**ADMINISTRATIVE SERVICES**

Governing Law: *The manner in which administrative services of the charter school are to be provided.*  
 - California Education Code Section 47605.6(h)

The School will contract with an outside vendor for any “back office” services that the school staffs are unable to perform (e.g. state reporting). The School will be responsible for all of its own personnel salary and benefit plans, provisions and costs. In the event that any administrative services are to be provided by the County, the specifics will be agreed to in a Memorandum of Understanding between the School and the County.

**FACILITIES**

Governing Law:  
~~The location of each School facility that the petitioner proposes to operate.~~  
 — California Education Code Section 47605.6(b)(5)(D)

~~A description of the facilities to be usedutilized by the charter school. The description of the facilities to be used by the charter school shall specify where the charter school intends to locate.~~  
 - California Education Code Section 47605.6(h)

Urban Montessori ~~shall be located at~~~~pursued~~ a facility ~~provided by~~~~from~~ the Oakland Unified School District under Proposition 39. The exact facility address shall be provided to the County prior to the start of each school year. The Charter School currently operates at the District’s Tilden/John Swett campus located at 4551 Steele Street, Oakland, CA 94619, and/or under a separately negotiated long-term lease arrangement upon its inception. The School currently operates at 5328 Brann Street (the “Sherman Campus”), owned by Oakland Unified School District and leased to Urban Montessori. Urban Montessori has a goal to serve a broad, diverse group of Oakland residents from across the city, and 5328 Brann Street is geographically central in Oakland. The Tilden/John Swett facility has a sufficient number of classrooms, office space, and other shared spaces to effectively serve all students at Urban Montessori.

In the event that the District does not provide facilities under Proposition 39 or the District facilities are not sufficient to serve all students, the School reserves the right to lease or purchase other facilities as may be needed.

~~Urban Montessori currently has 12 classrooms; a library used for assessment, after school program and music classes; a larger multi-use space for lunch and assemblies; and office space. The facility also includes a playground area and garden space, but no on-site parking for staff and visitors. Street parking is used by all.~~

~~In 2016, UMCS was the recipient of a Charter School Facilities Incentive Grant, of just under \$1,000,000 over three years. In conjunction with additional funding sources and partnership with OUSD, UMCS is in the process of scoping a major facility upgrade project, which will include removal of portables to be replaced with new and more classrooms, enlarging other classrooms, and landscaping.~~

~~The building is a California Building Standards Code compliant facility in accordance with Education Code Section 47610. The School shall comply with Education Code Section 47610 by utilizing a facility (or facilities) in that the facility is that are either compliant with the Field Act or compliant with the California State Building Standards Code. The facility shall be approved by the local/state fire marshal for the intended use. The School agrees to test sprinkler systems, fire extinguishers, and fire alarms at its facilities to ensure that they are maintained in an operable condition at all times.~~

- Please see Appendix Misc-4 for Urban Montessori's Lease Agreement

## IMPACT ON CHARTER AUTHORIZER

Governing Law: Potential civil liability effects, if any, upon the charter school, and upon the any school district where the charter school may operate and upon the County board of education.

- California Education Code Section 47605.6(h).

The School is to be operated by a California nonprofit public benefit corporation. This corporation is organized and operated exclusively for charitable purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code and California Revenue and Taxation Code Section 23701d.

Pursuant to Education Code Section 47604(ed), an entity that grants a charter to a School operated by or as a nonprofit public benefit corporation shall not be liable for the debts or obligations of the School or for claims arising from the performance of acts, errors or omissions by the School if the authority has complied with all oversight responsibilities required by law. The School shall work diligently to assist the County in meeting any and all oversight obligations under the law, reporting, or other County-requested protocol to ensure the County shall not be liable for the operation of the School.

Further, the School and County shall enter into a memorandum of understanding, wherein the School shall indemnify the County for the actions of the School under this charter. The corporate bylaws of the Corporation provide for indemnification of the School's Board, officers, agents, and employees, and the School will purchase general liability insurance and Board Members and Officer's insurance to secure against financial risks. As stated above, insurance amounts are determined by recommendation and the School's insurance company for schools of similar size, location, and student population. The County shall be named an additional insured on the general liability insurance

of the School.

The School shall be responsible for all supplies and equipment that it purchased and, in the event of loss by fire, disaster, or theft, the County shall have no responsibility for such items. Further, the County shall have no responsibility for losses of student property for any reason whatsoever and the School shall hold the County harmless from any such losses.

The School has instituted appropriate risk management practices as discussed herein, including screening of employees, establishing codes of conduct for children, and dispute resolution.

In order to ensure the necessary oversight and review of mandated reports for which the authorizer must determine fiscal health and sustainability, the following schedule of reporting deadline to the County will apply each year of the term of this charter;

1. September 15 – Final Unaudited Financial Report for Prior Year
2. December 15 – First Interim Financial Report for Current Year
3. March 15 – Second Interim Financial Report for Current Year
4. July 1 – Preliminary Budget for Subsequent Year

### **County Fee for Oversight**

The County may charge for the actual costs of supervisorial oversight of the School not to exceed 1% of the School's revenue, or the County may charge for the actual costs of supervisorial oversight of the School not to exceed 3% if the School is able to obtain substantially rent free facilities from the County.



## CONCLUSION

### TERM OF CHARTER PETITION

The School's charter shall begin on July 1, 2017 and expire five years thereafter. Any material revisions to School's charter shall be made by the mutual agreement of the governing board of the School and the County in accordance with Education Code Section 47607. The School may present a petition to renew or materially revise the Charter, and the County agrees to respond to such petitions pursuant to the process, criteria and timelines specified in Education Code Section 47605.

### INTERPRETING THE CHARTER

All terms of the charter that can be interpreted as within the intent of the California Education Code shall be interpreted in such a manner. The terms of this charter contract are severable. In the event that any of the provisions are determined to be unenforceable or invalid for any reason, the remainder of the charter shall remain in effect, unless mutually agreed otherwise by the School and the County. The County and the School agree to meet to discuss and resolve any issues or differences relating to invalidated provisions in a timely, good faith fashion.

Changes in the law or the County administration related to charter schools occur from time to time. The School shall fully comply with all such legal and/or administrative changes. Modifications to this charter pursuant to such changes shall be deemed administrative amendments and shall not be considered "material revisions" requiring approval pursuant to Education Code §47607(ba)(4).

### REVOKING THE CHARTER

The County may revoke the charter of the School in accordance with Education Code Section 47607.

### APPROVING THE CHARTER

To support the review process, Urban Montessori has provided a Performance Report and Staff Review Matrix as requested by the Alameda County Office of Education.

- [Please see Appendix Misc-5 for the Urban Montessori Performance Report](#)
- [Please see Appendix Misc-6 for the Urban Montessori Staff Review Matrix](#)

By approving this charter, the County will be fulfilling the intent of the Charter Schools Act of 1992 to improve pupil learning; create new professional opportunities for teachers; and provide parents and pupils with expanded choices in education and following the directive of law to encourage the creation of charter schools. The Petitioners are eager to work independently, yet cooperatively with the County to establish the highest bar for what a charter school can and should be. To this end, the Petitioners pledge to work cooperatively with the County to answer any concerns over this document and to present the County with the strongest possible proposal requesting a five-year term to renew operation.