

# *Dixie Montessori Academy Charter*



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# 1. School Purpose and Goals

## Executive Summary

### *Philosophy*

The learning environment of DMA is based on the Montessori philosophy because of its emphasis on the development of the whole child. Maria Montessori recognized that children have an innate desire to learn and, given the proper environment, will thrive intellectually, socially, emotionally and physically. This “prepared environment,” as Dr. Montessori termed it, includes not only the classroom with its materials and authentically trained teachers, but also a social setting and atmosphere where children can reach their fullest potential. DMA is open to all eligible students, and proudly adopts an educational approach that specifically addresses the community’s diversity to ensure that, truly, no child will be left behind.

### *Vision*

At DMA, our vision is to awaken within each child their unique potential that will enable them to make a valuable contribution to society.

### *Mission*

The mission of Dixie Montessori Academy (DMA) is to provide a child-centered, individualized education founded upon the philosophy of Dr. Maria Montessori. DMA will foster a structured environment of freedom and discovery in which each child can reach his or her full academic, social, and personal potential. Graduates of DMA will demonstrate creative thinking, self-discipline, respect, and cooperation, and will build a solid foundation for future success.

### *Educational Program*

The educational philosophy and methods of instruction supporting DMA’s mission and distinguishing its program include the following, each of which maps specifically to the Goals & Objectives hereinafter enumerated:

- Individualized & Differentiated Learning
- Mixed-age Groupings
- Integrated Teaching & Learning
- Prepared Environment
- Role of Teachers to Observe, Guide & Assess
- Classroom Environment of Respect & Character Education

The Dixie Montessori Academy environment and curriculum will thus be based on the freedom of a highly individualized and self-directed education within the specifically “prepared environment” of vertical (multi-age) classrooms, specialized didactic materials, careful teacher observation and guidance, and a strong commitment to the values of self-discipline and respect. DMA’s educational program will likewise include frequent opportunities for parental involvement, regular and specific assessment of progress, and ongoing web-based reporting. Assessment and reporting take place within a structure of explicit alignment between the Montessori curriculum and all state required curriculum.

## **Mission Specific Goals**

### *Goals and Objectives*

**Goal 1:** DMA’s individualized and differentiated curriculum will enable students to learn at their own pace and according to their own learning style. Providing students with differentiated instruction has been demonstrated to increase success and satisfaction in school (Tomlinson, 2000).

- Objective 1: Students will make choices daily that will influence their personal development objectives and consequently their Weekly Work Plans.
- Objective 2: Students will assess their own progress in conjunction with teachers and parents.
- Objective 3: Students will achieve their individual annual objectives.

**Goal 2:** DMA’s mixed age groupings enable children within a three-year age span to progress academically, socially, and personally (Aronson, 2002; Johnson & Johnson, 1983; Maheady, 1998; Wright & Cowen, 1985) without narrow boundaries of instruction.

- Objective 1: Younger students will observe and practice behavior and skills modeled by older students.
- Objective 2: Older students will internalize their learning by mentoring younger students.
- Objective 3: Students will be free to develop mastery in all subject areas regardless of grade level.

**Goal 3:** DMA’s “prepared environment” and the use of specialized didactic materials will enable students to progress from concrete, hands-on exploration to concept development and abstract understanding.

- Objective 1: Students will grasp new concepts and make connections across the curriculum.
- Objective 2: Students will be prepared to develop higher-level thinking skills as they apply skills learned (e.g., research and information technology) to pursue future research projects.

**Goal 4:** The teachers' role as "scientific observers" will enable students to take initiative and persist in their learning.

- Objective 1: Teachers' observations of individual students' performance and progress will direct individualized and group instruction.
- Objective 2: Teachers' observations of individual students' performance and progress will inform and direct changes in the prepared environment for each student.
- Objective 3: Teachers' observations of individual students' performance and progress will initiate invitations for inquiry.

**Goal 5:** Classroom life will enable students to demonstrate self-discipline, respect and cooperation.

- Objective 1: Teachers will follow the Utah code of ethics.
- Objective 2: Students will receive character education.
- Objective 3: Students will be engaged within the community of the classroom and the school.

#### *Assessment Plan*

Formative and summative assessments will be used to monitor student achievement and progress. For the formative assessments, each individual student and their parents and teacher will develop annual objectives that provide measurable results. These annual objectives will be established and reevaluated during the two annual parent-student-teacher conferences. The annual objectives are part of each student's required Student Education Plan (SEP). Teachers will also create Weekly Work Plans to support the annual objectives by listing the specific actions to be taken each week. These goals and plans support the student's personal development; they allow students to make choices themselves on a daily basis and assess their personal growth, which leads to the development of subsequent plans. Rubrics will then be used regularly to monitor the students' progress. For summative assessments, the Board will identify an external standardized test to use in addition to the State of Utah's end-of-level standardized tests. All student scores will be documented in a web-based record keeping system.

The main indicators of student progress will be students' work and behavior, and performance will be measured using scoring rubrics. Scoring rubrics provide the criteria for assessing virtually any product of students' work (e.g., essays, research reports, portfolios, works of art, recitals, oral presentations, performances, and group activities) and students' behavior. Judgments will be made by teachers, but the rubrics can also be used for students to assess their own work, and to provide feedback to parents and students about their progress.

Analytic rubrics will be used, in that separate scores will be provided for specified characteristics of a student's product or behavior. For each task (i.e., a specific assignment or overall behavior) that is required of the student, a scale will be determined that will describe how well or poorly any given task has been performed. For

example, DMA may use a three-level scale (i.e., satisfactory, progressing, and needs improvement). DMA will use the current rubric scale as a starting point to establish rubrics that have clear descriptions of the dimensions by which the students will be assessed, in hopes of providing all stakeholders (i.e., teachers, parents, and students) with valuable feedback about each student's progress.

The information will be disseminated to stakeholders (i.e., teachers, parents, and students) regularly throughout the academic year. More specifically, the information will be disseminated: (a) weekly to parents and students when the Weekly Work Plan is sent home, (b) monthly to teachers when students' monthly progress towards their individual annual objectives are evaluated, and (c) twice each academic year to parents and students when individual annual objectives are reviewed during the parent-student-teacher conferences.

### *Parent-Student-Teacher Conferences*

Every year each student will have at least two parent-student-teacher conferences each school year. One before the winter break and one before the end of the school year. The student's performance and progress will be used to reevaluate the annual objectives during those conferences. A portfolio of the students' work will also be reviewed at these conferences.

Our experience has demonstrated that there is a direct correlation between parent's attendance to teacher-parent-student conferences and the student's progress towards achieving their individual annual objectives. Therefore, DMA will track parent's attendance rates to the teacher-parent-student conferences. The information gathered will be used during the academic year to determine strategies to increase parent attendance to the conferences and ultimately parent involvement in their children's academic life.

## **Purpose**

The purposes of DMA as outlined in 53A-1a-503 are as follows:

**Purpose 1: *Improve student learning.*** The nature of a Montessori classroom is ideal for general children and those with unique needs. Dr. Montessori's teaching methods evolved primarily from work she did with at-risk children in Psychiatric clinics and in the slums. She saw their potential and then witnessed the speed and ease with which they progressed using her materials and philosophy. Her observations on the benefits of Montessori education to special populations are what gave her the desire and background to develop the Montessori educational approach. At DMA we will follow her work in helping all children meet their potential. For example, we will observe the children using specialized didactic materials, set a plan for the children to succeed and then document their progress. We will look at all the contextual information of the child and prepare an individualized program.



- **Purpose 2:** *Encourage the use of different and innovative teaching methods.* The Montessori philosophy is innovative when compared to traditional approaches. Multi-age grouping, individualized instruction and programming, research-based project work, collaborative work and peace education are just a few of the concepts that are considered innovative. This is further explained in the Curricular Emphasis section.
- **Purpose 3:** *Create new professional opportunities for educators that allow them to participate in designing and implementing the learning program.* Teachers at DMA will implement an authentic Montessori model in their classrooms. Our school model will provide a training and intern site for potential Montessori teachers throughout the region. The school will not only attend but also present at local and regional Montessori conferences. This will create opportunities for our experiences staff to be involved in ongoing teacher education.
- **Purpose 4:** *Increase choice of learning opportunities for students.* DMA will provide the only Montessori public school option in the greater St. George area.
- **Purpose 5:** *Establish new models of schools and a new form of accountability that emphasize measurement of learning outcomes and the creation of innovative measurement tools.* Students, teachers and parents will actively set academic and behavioral objectives. These objectives will be established at the parent-student-teacher conferences and will be reinforced by Weekly Work Organizers prepared by each teacher and student. These objectives will be instrumental in guiding student work plans on a weekly basis. An established computer-tracking program will report ongoing student progress to parents and administrators of the school. This record keeping system will also provide correlation between the academic objectives of the Utah curriculum standards and the nationally accredited Montessori curriculum. Parent-student-teacher conferences will provide ongoing updates of the students' progress toward their objectives. There will also be a variety of opportunities for stakeholder to see student work. This will not only provide a source of stakeholder accountability but will also assist in building a strong school community.
- **Purpose 6:** *Provide greater opportunities for parental involvement in management decisions at the school level.* DMA will establish collaborative decision-making and school-based management via structures through which both teachers and parents can become involved in the school and participate in its decision-making processes.

### Target Population

Dixie Montessori Academy is committed to providing accessible Montessori education to all eligible students. A continuous process of self-evaluation and improvement will be followed to ensure that students and families are eager to attend DMA.

## **2. Detailed Business Plan**

### **Operating Budget**

Dixie Montessori Academy is committed to maintaining a budgetary surplus in accordance with State requirements. DMA may amend the budget at any given time, in accordance with applicable statutes and rules, to manage the needs of the school.

### **Administration Overview**

The Director will oversee the administrative, academic and operational functions of the school on a day-to-day basis. The Director will also hire a Business Manager, and other staff to assume operational and administrative duties

### **Employee Benefits**

Employee benefits will be provided to all full-time teachers and staff.

### **Teachers**

Teachers will be Utah licensed (USBE) and Montessori certified according to the program established by Dr. Maria Montessori. Licensed teachers who are also Montessori certified will be specifically sought out. The budget will allow for each teacher to pursue their Montessori certification and we expect all our full-time teachers to complete that process.

As is outlined in Dr. Montessori's philosophy each classroom will not only have a licensed and certified teacher, but a part-time instructional aide as well.

During each year, teachers will receive specific instruction on curriculum delivery and other items important to our school's mission. This instruction will include the Montessori certification training described above, and the Director, Board members or others may also do additional training as needed.

### **Class Size and Schedule**

Each class will be no larger than 30 students.

During the morning hours before lunch the students will be engaged in the work cycle where the focus will be in core subjects. The second half of the day, following lunch and recess, will focus on exploring other subjects such as: cultural subjects, research, fine arts and foreign language.

### **Special Education**

We will hire special education instructors according to the needs of our student body. DMA will also contract professional services in various disciplines to assist the special education teachers as needed. During the school year, we will maintain restricted funds separate from all other operational funds. Costs will be tracked by function, object and program in line with USBE's recommended chart of accounts.

### **Curriculum**

Updates to the curriculum and supplies will be budgeted for on a yearly basis.

### **Financial Reports and Audits**

DMA's budget reporting will be in accordance with Generally Accepted Accounting Principles (GAAP), including Generally Accepted Governmental Auditing Standards. In accordance to Utah Code 53A-1a-507(4) the board will ensure that a local independent CPA firm audits the financial records of the school annually with experience in the procedures of an audit; more specifically that will adhere to the principles of Generally Accepted Governmental Auditing Standards. DMA's business manager will maintain supporting records in sufficient detail to prepare the school's financial reports, including:

- Annual financial statements for audits and the annual budget;
- Monthly reports including budget versus actual financial statements with explanations for significant variances, updates of cash flow projections, and monthly reports to the Utah State Office of Education; and
- Quarterly preparation of IRS Form 941 and payroll and tax returns (unless outsourced) and other reports upon request. Under the direction of the Board, the Director shall be ultimately responsible for report completion and submission to the state as set forth in the Utah Charter School Act.

### **Insurance**

DMA's board is committed to ensuring that all required policies cover the school's students, facilities and staff are in place and continued in force per the Utah Code.

### 3. Fiscal Procedures

Dixie Montessori Academy will maintain its financial and accounting records using the State Office of Education guidelines for Budgeting, Accounting and Auditing for Utah School Districts, and in accordance with all applicable federal, state and local laws and regulations. DMA will ensure such records are available to the state or other interested parties, as requested in accordance with Utah Code R277-425-3.

#### *Budget Process*

DMA's Director, staff and Business Administrator shall be responsible for preparing an annual operating budget of revenue and expenses, cash flow projections and a capital budget. These budgets and projections must be reviewed and approved by the DMA Board of Directors in an open board meeting, and may be modified as necessary, in accordance with state and federal law. DMA will maintain a comparison of actual expenditures to budgeted expenses. These budgets must support DMA's mission, stated goals and will provide the following:

- Sufficient detail to enable reasonably accurate projections of revenues and expenses, separation of capital and operational items, cash flow and subsequent audit trail;
- A balanced budget – appropriations will be planned in a way so that they equal or are less than anticipated revenues; and
- Budgets must be aligned with board-stated priorities.

#### *Limits on Appropriations*

The Board may not make any appropriation that violates any DMA policy or exceeds its estimated expendable revenue, including undistributed reserves, in the final budget. Appropriations will be made only as authorized by the approved budget. DMA will require a properly signed Expense Requisition as authorization for the expenditure of funds. Requisitions will require proper source documentation and be checked against the budget and current cash flow before funds are distributed. Final approval will require two signatures. The Business Administrator for the school will monitor appropriations, and make a monthly accounting to the Board.

#### *Budget Reports*

Financial reporting will be in accordance with Generally Accepted Accounting Principles (GAAP), including Generally Accepted Governmental Auditing Standards. DMA will maintain supporting records in sufficient detail to prepare the school's financial reports, including:

- Annual financial statements for audits and the annual budget;
- Monthly reports including budget vs. actual financial statements with explanations for significant variances, updates of cash flow projections, and

monthly, quarterly or as otherwise required, reports to the Utah State Office of Education; and

- Quarterly preparation of IRS Forms, payroll and tax returns and other reports upon request.

Under the direction of the Board, the Director and/or the Business Administrator shall be ultimately responsible for filling out and submitting reports to the state.

#### *Expendable Revenue/Undistributed Reserves*

As part of the budgeting process, the Board, the Director and Business Administrator will determine annual operating safety margins. Subject to any restrictions imposed by law or other rules, the Board reserves the right to reallocated funds from one line item in the budget to another as prescribed if purchasing practices or conservation result in an expenditure different than the budgeted amount. An adequate financial reserve will be created and maintained as a part of DMA's overall financial plan. Any undistributed reserves will be added to DMA's budget for the following year, and will be properly re-allocated at the direction of the Board. Any expendable revenue and undistributed reserves must be used to further the vision and mission of DMA.

#### *Emergency Expenditures*

DMA will include reasonably sufficient reserves in its budget to meet any unexpected or emergency expenditures. Power is granted to the Director to authorize emergency expenditures outside of these policies if the school has funds available for such a purchase and only when the immediate health, safety or welfare of students or employees is at risk or if the school will suffer financial or operational damage. The director shall notify the Board Chairman within 24 hours or as soon as possible. A written report stating the basis for the emergency and the details of the particular expense shall be submitted to the Board and will be included in the school's financial records.

#### *Business Administrator*

DMA will hire a Business Administrator who will assist the Director with any planning and decision making in regards to the finances of the school, and any other duties as required.

#### *Independent Audits*

DMA will hire a qualified independent certified public accounting firm to conduct an annual financial audit of the school's financial records. The results of the audit will be provided to DMA's Board and the state in written form within the statutory time limits required by the state, and shall be published and posted as required by law. The Board, Director and Business Administrator will work diligently to assure that audit findings are addressed prior to the next regularly scheduled audit.

### *Fundraising and Grants*

Fundraising in general will be overseen by the Director. Grants applied for by teachers or other staff should be reported to the Business Administrator for proper accounting. All grant funds should be made out to the school. Inventory accounting and appropriate retention and disposal policies will be implemented to assist in accounting for items purchased with federal or restricted funds in accordance with rules and guidelines appropriate to such funds.

### *School Finance Training*

The Business Administrator of DMA will attend state finance training each year. DMA recognizes that the laws and administrative responsibilities are constantly evolving and that the only way for the Business Administrator to properly fulfill his or her duties is by being properly trained by USBE. The Director or Assistant Director will also attend this training every year.

## 4. Program of Instruction

### Educational Program

Dixie Montessori Academy is committed to preparing students to be constructive contributors in their community by focusing on academic, personal and social development. The learning environment of DMA is based on the Montessori philosophy because of its emphasis on the development of the whole child. Maria Montessori recognized that children have an innate desire to learn and, given the proper environment, they will thrive intellectually, socially, emotionally and physically. This “prepared environment,” as Dr. Montessori termed it, includes not only the classroom with its materials and authentically trained teachers, but also a social setting and atmosphere where children can reach their fullest potential. Under this philosophy, it is imperative that the learning environment supports the whole child.

The Montessori philosophy, which was initially developed for underprivileged and handicapped children, specifically addresses diversity in communities by providing a child-centered, individualized approach to teaching and learning. DMA’s educational approach addresses the community’s diversity to ensure that no child is left behind. The educational tenets of our philosophy and methods of instruction supporting our mission and distinguishing our program are:

- *Individualized & Differentiated Learning.* Montessori education is built upon the tenet that all learners are individuals in style, pace, interests and that all children can learn. DMA’s individualized curriculum allows children to strive for their own personal best. Teachers, students, and parents at DMA partner and develop annual objectives that provide measurable, weekly and monthly objectives. These objectives will be established and reviewed during the parent-student-teacher conferences. Teachers will create Weekly Work Plans to support the Annual Objectives by listing the specific actions to be taken each week. Parents will receive a copy of their child’s completed Weekly Work Plan on a weekly basis. These goals and plans support the student’s personal development; they allow students to make choices themselves on a daily basis and assess their personal growth, which leads to the development of subsequent plans. Providing students with differentiated instruction (integral to individualized learning and the Montessori philosophy) has been demonstrated to increase success and satisfaction in school (ERIC ED43572-Carol Ann Tomlinson, 2000).
- *Mixed-age Groupings.* Montessori classrooms span three years at the elementary level and two in the middle school program. These mixed-age settings provide several benefits to the student. They more closely model real-life situations where people of varying ages and experience work and live together. Children in this setting also benefit from peer tutoring opportunities that naturally occur. Older students model and motivate the younger students. The younger students aspire to what the older students can do. Skills are thus reinforced for not only the younger students but also the older students. The



benefits of collaborative learning arrangements extend beyond academic achievement. The social climate of these classrooms enhances social relations, discipline and individual well-being. (Aronson, 2002; Johnson & Johnson, 1983; Maheady, 1998; Wright & Cowen, 1985).

- *Integrated Teaching & Learning.* Montessori education emphasizes interdisciplinary teaching to encourage students to make connections across the curriculum and to their own personal lives. Emphasis will be placed on projects that require open-ended research and in-depth study using primary and secondary sources as well as other materials. The Montessori didactic materials were specifically designed to enable students to understand the connections in their learning. When students understand these connections in their learning activities, they become more motivated learners.
- *Prepared Environment.* Montessori environments are designed to enable instruction to progress from the concrete, hands-on exploration to concept development to abstract understanding. Elementary classrooms at DMA will have an abundance of carefully sequenced Montessori materials to support this learning progression. As children progress to the Middle School level and develop higher-level thinking skills, research and reference materials, along with information technology will be used to pursue independent research projects that reinforce what has been learned with the Montessori materials.
- *Teacher's Role.* Montessori teachers are trained to be scientific observers of their students and the learning environment. These observations will guide teachers in their lesson presentations and in their evaluation of each student's progress. Teachers guide students by making changes in the environment, offering invitations for inquiry and direct instruction. Teachers will work to create and sustain a classroom and school culture where demonstrations of respect, initiative, risk-taking and persistence in learning are the norm. In the younger grades, teachers will work with individuals or small groups. At the Middle School level, teachers will provide more whole class instruction, but will challenge and extend the self-directed habits of the elementary years as students begin to direct the development of their own Annual Objectives and pursue research and service learning projects.
- *Parent Involvement.* Communities consist of various types of families and DMA acknowledges that the term "parents," includes legal guardians. DMA considers all caregivers to be vital partners in the education of their children. Therefore, parents will be welcome at DMA and will be encouraged to participate in and help set the direction of school life. In conjunction with teachers and students, parents



will be encouraged to provide input and feedback on the Annual Objectives and Weekly Work Plans. DMA is committed to providing frequent parent education opportunities so that the Montessori philosophy is well understood and embraced.

- *Character Education.* Personal and social education will be integrated into DMA's learning program. Classroom life will emphasize the Montessori values of grace, courtesy, respect and responsibility. Dr. Montessori's Peace Education efforts, which were acknowledged by her being nominated for the Nobel Peace Prize, will be a cornerstone of the Character Education program. Teachers will model these values and expect them from students throughout the school.
- *Community Connection.* Children grow and learn in an increasingly expansive and diverse community. Students at DMA will first come to understand the world and their part in it by discovering the community within the classroom, then by contributing to the life of the school and caring for the surrounding plant and animal habitats, and finally by supporting the larger community beyond the school.

### Curriculum Overview

*Mathematics, K-6.* Students will use a range of Montessori materials to explore concepts extensively in concrete form before abstracting and integrating them. The mathematics curriculum addresses the content areas of enumeration, operational experiences to develop an understanding of the four operations, fact development, fractions, problem solving, measurement, logic and probability, the language of mathematics, geometry, and algebra.

*Mathematics, 7.* Students will use a math textbook to guide core content skill development in relation to the Utah Core Curriculum for Mathematics. Students will engage in skill integration and application through in-depth practical application and project-based experiences.

*Language Arts, K-6.* The Montessori curriculum stresses the interrelatedness of reading and writing and promotes an integrated approach where reading, writing and grammar occur across the curriculum. Phonemic awareness, direct instruction in phonics, grammar, and vocabulary development are essential components of the curriculum, as well as developing fluency and comprehension skills. Students will develop strong competencies in the development of writing skills in all genres and comprehension of diverse types of reading materials. Development and presentations of project work in oral presentations will be a focus of this curriculum.

*Language Arts, 7.* The Middle School curriculum will center on the development of effective written communication skills through frequent guided writing and critiquing experiences, in-depth investigations with classic and contemporary literature, development of research skills using text and information technologies, and refinement of effective oral presentation and communication within teamwork and public settings.

*History and Social Sciences, K-7.* The Montessori curriculum in this field of study provides opportunities for students to build an awareness of their global habitat. Students will learn about the natural laws governing our planet, about the vulnerability of the environment and the vast diversities in the life forms and social cultures. These experiences and lessons will help students become more appreciative and responsible global citizens.

History in the Montessori curriculum is the subject that unifies the child's knowledge of the world. This study enables the student to acquire a concept of self in time and space. Montessori teacher-led lessons and demonstrations inspire careful observations of the world around the child. Experimentation provides opportunity for student-driven inquiry and research. A major goal of this curriculum is to assist a child to develop a self-concept that is meaningful. Each student will know that he or she is an integral part of our world, important to the process of perfecting that world, and vulnerable to other forces at work in the universe.

*Foreign Language, K-6.* The Utah Common Core Knowledge Mission Statement for Foreign Language states, "Language and communication are at the heart of the human experience. This envisions a future in which all students will develop and maintain proficiency in English and at least one other language." In response, all DMA students will receive two periods of Spanish language instruction per week, integrating oral language games, songs, and activities, bilingual picture books, and introduction to written language. In addition, this instruction will serve to acknowledge the diversity in our community and provide a tool to encourage cultural understanding.

*Foreign Language, 7.* Middle School students will receive increased formal Spanish language instruction four times per week. Students will use a foreign language textbook and workbook in addition to ongoing teacher-created activities. Students may also apply foreign language skills within service learning projects in the DMA community.

*Technology and the Arts, K-7.* The visual and performing arts will be an integral part of the curriculum at DMA. Both will provide significant access points for student understanding, opportunities for expression and creativity, and ongoing learning about

diverse perspectives on the world. Meaningful arts experiences will be integrated into every classroom as activities of choice and exploration. This curriculum will be enriched through specific instruction and projects once per week with arts specialists. Computers with internet and email access will be integrated into the teaching and learning at DMA.

*Health and Conflict Resolution Education, K-7.* DMA will be committed to the development of the whole child therefore physical and health education will be significant components of the curriculum. Students will enjoy at least one full period every day of socially based physical activity in the form of recess. In addition, students will engage in more directed physical play and development each week. In the Lower Elementary, students will also learn about body systems, social pressures, and human health and illness through theme-based studies and self-directed research within the classroom. In the Upper Elementary and Middle School, students will learn about human health and growth, as well as substance abuse. Conflict resolution skills are core to the school's learning objectives and will be taught and supported explicitly at each grade level.

### **Utah State Required Curriculum**

When teachers pursue Montessori certification, they carefully document and sequence comprehensive lessons for each of the core curriculum subjects within a series of Albums. Montessori Albums are comprehensive curriculum manuals utilized by teachers to guide daily instruction. Our teachers will be prepared, through their Montessori training, to develop lessons that provide extensions to the curriculum and enhance student's individual learning styles. This experience will allow DMA teachers to develop ongoing lessons to meet not only their students' needs but also the required Curriculum for the state of Utah.

All required standards for the kindergarten through seventh grade will be met in the comprehensive Montessori curriculum. The sequence of some units is presented differently due to the need for unit cohesiveness and the individual child's needs, learning style, and readiness for learning. DMA's Director and curriculum subcommittee will identify and continually develop the Montessori curriculum to meet or exceed the Utah state curriculum standards.

### **Methods of Instruction**

Dixie Montessori Academy's curriculum is divided into 4 levels:

- Grade K** (Early Childhood)
- Grade 1-3** (Lower Elementary)
- Grade 4-6** (Upper Elementary)
- Grade 7** (Middle School)

A teacher and an assistant will be assigned to each elementary class that consists of 30 or fewer students

Each student will stay with the same teacher for the three years in the Lower Elementary level, three years in the Upper Elementary level and one year in the Middle School. This continuity maximizes teaching and learning time because students do not spend time every year getting to know new teachers, classrooms and entire new peer groups. Research on this approach demonstrates increased student achievement and greater parental involvement (ERIC ED 414098, Daniel L. Burke, 1977) both of which are central to DMA's mission.

The weekly organization of learning time will be based on a Montessori tenet: *students must have long uninterrupted daily work periods (three hours) each day*. Therefore, the morning will be dedicated to this core work time. The afternoon will include lunch, recess, time with specialists for physical education, music, art, and Spanish. This design supports the development of a strong collaborative professional environment by providing teachers with time for planning and meeting during the school day, including regular curriculum and assessment meetings.

In the Kindergarten and Lower Elementary programs, our program will provide an array of specially developed materials and methods. These allow young children to build concepts from concrete models and experiences through self-directed activity and peer and teacher interaction.

These core materials become less evident in the Upper Elementary as students begin to transition to symbolic and abstract conceptual understandings. Our Middle School materials are rooted in active, applied learning. Students connect with larger communities through project-based and service learning activities that require the integration and application of skills in real-world contexts. Interdisciplinary, student-driven projects, such as environmental research, student generated business endeavors, and community contributions are the heart of our Middle School experience, while textbooks will be used to reinforce fluency with basic skills.

Students will work at their own individual pace in order to prepare for benchmark standards. Students who do not demonstrate mastery of the benchmarks will be encouraged to utilize self and teacher assessment rubrics to achieve an acceptable mastery level. Any previous work that was completed to fulfill assignment requirements may be revisited in order for mastery of specific skills to occur.

Teachers will present multiple options for students to demonstrate the skills and knowledge required for the benchmark mastery. Teachers will be directed to change the mode of instruction to meet the child's level of understanding and learning style. All available resources will be utilized in order for mastery to occur. Dr. Montessori's council to "follow the child" will be the guiding premise when student success is at stake.

In-service training days for teachers and staff will be included on the school calendar to ensure an understanding of the benchmarks and how they relate to the Utah Core Curriculum and the Montessori curriculum. DMA teachers will also engage in collegial

observation and collaboration during regular intervals throughout the year. A teacher may request that colleagues observe selected children during work times or observe instructional efforts in order to build stronger classroom practices and build more effective learning experiences for diverse students.

### **Library Plan**

DMA's goals and objectives are that students can demonstrate the ability to locate, evaluate, interpret, and communicate information and ideas for intellectual development, personal enjoyment, and lifelong learning. Students will also be taught critical thinking processes, analysis of information, ethical use of information and of information technology. DMA will expand this vision by building a literary collection that is the basis for all academic learning.

DMA will provide 12 volumes per student or a minimum of approximately 4,920 volumes. The collection of books and resource materials will be as extensive as financially feasible and expand as funds become available.

Literature for reading abilities and enjoyment levels will be made available. Opportunities will be provided for students, parents, and volunteers to recommend literary additions to the library. DMA will give priority to classic books containing primary sources of historical and academic information. Books deemed controversial by a staff member or parent will be available but students will be required to have prior parental permission to access them.

## ***5. Parental Involvement***

### **Opportunities**

Part of the vision of Dixie Montessori Academy is a belief in the active involvement of parents in the ultimate success of their student at DMA. Many opportunities for parental involvement will be created. DMA strongly encourages volunteer parental involvement to assist in the daily operation of the academy. All volunteerism is strictly optional, but is highly encouraged for the benefit of students and the school as a whole.

At the end of the academic year, DMA will send out a survey to all school families asking for suggestions and input concerning items such as classroom management, extracurricular activities, elective courses, and volunteer opportunities for consideration of the Director. This allows for parents/guardians to influence school programs.

DMA will advertise the monthly Board meeting place and time to parents and the public. Parents will have the opportunity to attend the meeting and make public comment if they desire by completing a request to be added to the meeting agenda in advance of the meeting.

### **Notification**

To make sure all parents receive notice of board meetings and volunteer opportunities DMA will place a message board at the pick-up / drop-off areas of the school. Additionally, an email will be sent to all parents who have an email address on file at the school. Notice will be made on the school website as well.

### **Parent Teacher Volunteer Organization (PTVO)**

A Parent Teacher Volunteer Organization (PTVO) will be formed, which is DMA's equivalent of a PTA or PTO. The parent volunteer group is not a committee of the governing board. The PTVO is meant to provide stakeholders of DMA students the opportunity to participate in school decision-making and coordination of volunteer efforts, working with the Director or person the director assigns

### **Accountability Group (AG)**

The Board will create a committee called the Accountability Group (AG). The group is essential to the effective operation, management and control of the school. The Accountability Group is a committee that reports to the governing board. The AG's primary function is to advise the governing board and to submit recommendations regarding school program effectiveness, parent satisfaction and school safety. The governing board may expand the goals of the Accountability Group.

The group should include the school director, no more than 2 governing board members, parents, teachers, community members and members from the Parent Teacher Volunteer Organization (PTVO).

When evaluating student achievement, the accountability group may gather student performance data from a variety of sources including performance on standardized tests, as well as regular classroom assessments and student portfolios. Student grade promotion, graduation rates, and matriculation rates provide information on student preparedness. The accountability group should also ascertain whether the school is providing extra intervention to struggling students and challenging material for advanced students.

The group will also report on the effectiveness of the strategic plan goals to assist the governing board in its determination of achieving the schools vision and mission.

The group will also design surveys that are designed to measure academic progress, school safety, parent satisfaction and other criteria as the board may need. The governing board will approve all surveys and forms.

As a committee of the governing board, the accountability group provides summary data reports, school survey progress and summary reports, and goal progress reports directly to the governing board.

The school staff regularly distributes and manipulates data internally. Comprehensive reports are submitted to the accountability group for evaluation. The accountability group then submits summary reports to the governing board. In addition to student achievement data, accreditation data, and school survey results, the accountability group may also report on data reflecting the school's values, data required in the charter application, or data required in the Charter Agreement. From time to time, the Director may request specific data targets from the accountability group to facilitate school improvement. In addition, the governing board may request data specifically needed for financial decision making, such as needs assessment or resource allocation data.

The reporting structures for the accountability group should be established by the board and put into writing. The accountability group should be meeting regularly on its own and reporting at least quarterly to the governing board. The accountability group should provide summarized data reports, school survey progress and summary reports, as well as any written recommendations to the governing board. The governing will formally report to the authorizer on an annual basis through state required reports and school-



specific reports as indicated in the Charter Agreement. The governing board may request that the accountability group provide a year-end summary report to parents, investors, and other stakeholders in the community. In addition, the accountability group should keep minutes for all meetings and make those available to the governing board or other stakeholders.

The accountability group will regularly monitor data and progress toward goal accomplishment, the accountability group may also provide written recommendations to the governing board. These recommendations may include goals or targets for school improvement, areas where the school may benefit from a formal needs assessment process, or recommendations for the allocation of resources. The accountability group may make recommendations requesting certain resource acquisition or re-allocation in the school building in order to accomplish school goals.

### Visitors

Office staff will be able to monitor all incoming and outgoing visitors. All visitors will wear a prominent visitor's badge.



## 6. Employees

Dixie Montessori Academy is committed to educating the whole child by utilizing Dr. Maria Montessori's proven educational philosophy and methodology. Teachers at DMA will have received or be in the process of receiving Montessori teacher certification from an accredited Montessori teacher education institution. Teachers will be certified on the level they are teaching and display expertise in all aspects of the curriculum on this level. All teachers will hold appropriate license and endorsements as outlined in Utah rule. DMA will employ a Special Education Coordinator to ensure that students with special needs are experiencing success within the inclusion of the Montessori environment. All employees are expected to:

- Model appropriate behavior: treating all faculty and students with respect
- Help Maintain a clean and orderly environment
- Implement all policies and standards as put forth in DMA Handbooks

## Administration

### *Director*

The instructional leader of Dixie Montessori Academy will be its Director. DMA will seek a Director with, at minimum, a bachelor's degree in a field of study related to education (preferably a master's degree candidate), Montessori certification from an accredited teacher preparation institute, and Montessori teaching or administration experience (minimum of 3 years) The candidate for this position must display an understanding of school financial matters, the ability to develop positive relationships with parents and staff, knowledge of the Utah Core Curriculum Standards, an understanding of Special Education programs and the law. We will seek an individual that also has experience working with a non-profit Board of Directors, will have strong communication skills, and be culturally sensitive to the population of the school.

The Director's primary responsibility will be to set and maintain an environment conducive to learning and establish a positive educational environment for DMA students. The Director's instructional duties will include: maintaining necessary standards required for Montessori intern site status, reading about the methods of instruction, gaining insight into successful strategies, reviewing research that supports the methods of instruction, viewing accounts about practices in successful schools and districts, being familiar with the instructional methods of all teachers, participating in training and in-service to remain current in educational research, providing in-service to teachers and serving as a teacher resource for instructional, as well as curricular help.

Role

To guide and direct the activities of the DMA in accordance with the philosophy and method as set forth by Dr. Maria Montessori and all Utah laws and codes governing charter schools under the direction and guidance from the governing board.

#### Responsibilities

- Oversees the Montessori philosophy and method within the school
- Teacher and student discipline and progress evaluation
- Oversees the financial department
- Meets regularly with the business administrator
- Meets monthly with the governing board
- Implement all policies and standards as put forth in DMA Handbooks
- Prepares and/or oversees all state application and forms
- Communicates regularly with parents
- Community Relations
- Attends meetings and workshops as determined by the board

#### Qualifications and Education Requirements

- Bachelor's degree from an accredited institution. Evidence of professional experience and continuing professional growth
- Evidence of competence in administration
- Montessori certificate from an accredited teacher education institute

All hiring and firing of DMA employees will the responsibility of the DMA Director.

It will be the responsibility of the DMA Director to see that the operation and maintenance of DMA building fixtures and equipment are hired out to qualified individuals.

Under the Board's direction, the Director will provide timely completion and submittal of state and federal reports. Reports will be reviewed for approval by the Board before submission.

#### *Assistant Director*

##### Role

Responsible for assisting the school Director in the leadership, coordination and management of the school program, curriculum and testing assessments.

##### Responsibilities

- As directed by the Director, assist in developing and maintaining an effective educational program consistent with State and Federal guidelines and the philosophy, policies and goals of the School Board; meeting and conferring with students, parents, faculty and staff; maintaining records and files; preparing reports.
- Assist the Director in the overall administration of the school; interpret and enforce school and school division policies and regulations.
- Assist the Director in the transformation of the school culture into a results-oriented collaborative Montessori learning community.
- Assist the Director in the implementation of the Board-approved Montessori curriculum.
- Assist the Director in monitoring compliance with federal, state, and local mandates and guidelines related to local and state testing programs.
- Coordinate and administer State and Federal elementary school assessment testing as outlined by State and Federal guidelines.
- Assist the Director in ensuring that classroom instruction aligns with the state core curriculum and the school's goals and philosophy.
- Work with department heads and faculty in various tasks and assignments.
- Attend SPED IEP and or disciplinary meetings as needed or in the absence of the Director/Principal.
- Assist the Director in maintaining discipline throughout the student body; deal with special cases as necessary.
- Maintain a variety of files; prepare periodic and special reports as required.
- Assist the Director in explaining and interpreting school-wide curriculum/instructional goals and objectives to teachers, parents, pupils, and the community.
- Assist the Director in supervising the Front Office staff.

### *Business Administrator*

#### **Role**

To implement activities of the DMA in accordance with the philosophy and method as set forth by Dr. Maria Montessori and all Utah laws and codes governing charter schools under the direction and guidance of the Directors. DMA's Business Administrator will maintain supporting records in sufficient detail to prepare the school's financial reports

#### **Responsibilities**

- Prepares monthly reports including budget versus actual financial statements with explanations for significant variances
- Updates of cash flow projections
- Monthly reports to the Utah State Office of Education
- Quarterly preparation of IRS Form 941 and payroll and tax returns (unless outsourced) and other reports upon request
- Maintain accurate and timely detailed records in support of financial and governmental requirements
- Attends meetings and workshops as determined by the director

#### Qualifications and Education Requirements

- Strong interpersonal and multi-tasking skills
- Have a complete understanding of designated financial software

### **Paraprofessionals, Substitute Teachers, and Interns**

All paraprofessionals will be required to complete the 50-hour Introduction to the Montessori Philosophy and Foundations course prior to the first day of school. The assignments and requirements of this course will be completed in a timely manner as deemed appropriate by the school administrator and course director. All DMA paraprofessionals shall meet the requirements and perform the duties outlined in *Utah Admin Rule R277-524* as it applies to employment at DMA. In addition, all paraprofessionals and interns will work under the supervision and direction of a qualified DMA teacher. Interns will be accepted from accredited Montessori teacher preparation courses that will provide adequate field supervision. Substitute teachers will be required to attend a substitute training and introduction to the Montessori philosophy prior to employment at DMA.

### **Special Education Coordinator**

DMA will have at least one full-time trained Special Education Coordinator on staff at all times. The Special Education Coordinator will coordinate all Special Education related services and preside at all IEP meetings and initial team staffing meetings. The Special Education Coordinator must possess the education, skills and credentials of a special educator, who can appropriately select, administer and interpret assessments for determining Special Education eligibility. In addition, the Special Education coordinator will provide support and training (or coordinate trainings) for DMA's Director and staff to insure knowledge of IDEA 2004 and the Utah Special Education Rules' requirements.

## Teachers

### *Educational Background and Qualifications*

All teachers will have current Utah credentials and endorsements as outlined in *Utah Admin Code R277-520*. Each teacher will also be Montessori certified or in process of certification from a Montessori accredited teacher education institute.

### *Instructional Skills*

DMA teachers will have a clear understanding of how the Utah State education standards align with the Montessori curriculum. Teachers must be able to develop lessons to meet not only those curriculum standards but also lessons in keeping with the individualized, hands-on approach of the Montessori Method of education.

### *Highly Qualified*

Teachers who do not qualify as “highly qualified” under R-277-510 will be required to achieve that status. DMA will assist each teacher to meet this status by offering individual mentoring from master teachers on staff and by providing further training and assistance to assure this status.

### *Management of School Equipment and Supplies*

Teachers will be responsible for all materials and supplies within their rooms. Yearly inventories will be used for insurance purposes and to assess replacement needs. Teacher supplies will be allocated on an “as-needed” basis, with the Director determining the “need.” Each teacher will receive a budget for supplies and equipment, which may be purchased in accordance with DMA’s Fiscal Policy.

## Teacher Evaluations

All teachers at DMA will receive at least one formal evaluation per calendar year and several informal evaluations. A formal evaluation is a pre-determined evaluation, wherein the teacher will be informed of the time, methodology, and expectations of the evaluator/Director. This information will be introduced to all teachers at the beginning of the school year so they will understand the purpose and methods they will be evaluated against. In a formal evaluation, each employee will meet in a pre-conference with the evaluator prior to the evaluation to review lesson plans and evaluation criteria as set forth below. In addition to formal evaluations, each teacher will receive regular “informal evaluation” every four to eight weeks depending on the circumstances.

### *Formal Evaluation: Pre-Observation Conference & Observation*

The first step in preparing to observe an employee at DMA is a planning or pre-observation conference. At the conference, the teacher should state lesson objectives, strategies, techniques, materials required, and other preparations. In turn, the Director will clearly communicate the methodology, the expectations, and ask further questions so that the teacher and the Director fully understand the proposed strategies and

activities. The teacher and the Director may also contribute information and ideas to develop the focus for the observation, agree on how the information will be collected, and set the time of the observation and the follow-up or post observation conference. During the evaluation, the evaluator should collect data that is objective, accurate, and clear to both parties in order to gather information for an effective post-observation conference.

#### *Formal Evaluation: Post-Observation Conference*

A post conference will be held no longer than one week after the formal evaluation to discuss the strengths and areas where improvement is needed. If an evaluation reveals poor job performance, remediation will be suggested and a mentor teacher provided to help the teacher make the required changes or improvements, such recommendations will be reviewed for progress as necessary. If the problem persists, DMA will generally follow a traditional disciplinary process including: (i) giving notice to the employee of the specific performance problems and the consequences of not improving; (ii) establishing goals for improvement; (iii) setting a reasonable time frame for meeting the goals (normally two weeks to thirty days); (iv) following up to see if there is improvement; and (v) terminating the employee if the goals have not been met.

#### *Entry Years Enhancement (EYE) Program*

DMA is committed to the development of its entry level teachers, and we will provide special attention to these teachers during their first three years of employment to provide them an avenue for success and competence as required by Utah Admin. R277-522. DMA will accomplish this by ensuring its entry level teachers: (i) develop the skills required of capable teachers; and (ii) complete all enhancements enumerated in R277-522 for Level 1 teachers. The purpose of DMA's EYE Program is to develop in entry level teachers a successful set of teaching skills and strategies with assistance from experienced colleagues. As part of DMA's EYE Program, the Director will assign each Level 1 teacher, as defined by law, a mentor-teacher in the first semester of teaching to supervise, support, and act as a resource for the entry level teacher as set forth in R277-522-3(B). Additionally, DMA will provide training, mentoring, testing, assessment, evaluation, and assistance in developing and evaluating each entry level teacher's professional portfolio.

#### *Supervision and Improvement of Instruction*

Beginning with the classroom teacher, the Director, and the Board, will take a collaborative approach to ensure DMA goals and objectives are achieved. Correction and instructional approaches will be made with the input of all stakeholders with the understanding that the Board will act in the best interests of the students and their families.

The Director will regularly provide the Board with updates on curriculum and any proposed improvements to DMA's instructional program. After receiving this information, the Board will determine whether or not to modify the instructional program. Supervision of instruction on a day-to-day basis will be the responsibility of the director. The director will be responsible for interpreting Board policy in all instructional and behavioral concerns. Based on instructional methods, test scores, the computerized tracking system, and student achievement, a collaborative effort will be used to improve supervision and instruction within DMA. The staff member will have the opportunity for remediation to meet the requirements for Entry Years Enhancement found in R277-502 and R277-522. The staff member will get written notice of non-compliance, criteria for dismissal and will work with administration for compliance.

Teachers at DMA will be provided numerous opportunities to improve and develop their teaching skills either in a specific curriculum (e.g. Montessori professional development workshops) or in the general practice. The intent behind staff development is to: (i) provide professional development and technical assistance to teachers and administrators in their school-wide implementation of DMA's comprehensive program of instruction; (ii) to focus on meaningful learning and understanding for all students in order to raise their level of achievement; and (iii) provide follow-up components for professional development to ensure that implementation of the comprehensive program of instruction results in improved student performance. Each employee will be evaluated twice a year and if needed a plan of action will be created.

## **Terms & Conditions of Employment**

### *Anti-Discrimination Policy*

In accordance with Title VII, Civil Rights Act of 1964, the selection and hiring of applicants shall be made without regard to age, race, color, creed, sex, marital status, national origin, religion, ancestry, or place of residence. Additionally, DMA hiring shall be in accordance with the Americans with Disabilities Act of 1990 ("ADA") which requires candidate selection to be made without regard to disability if an individual is disabled, as defined by the ADA, and is qualified to perform the duties and/or essential functions of the advertised position and can perform these duties and/or functions with or without reasonable accommodation. Finally, employee selection shall be made without regard to age as mandated in the Age Discrimination Act of 1967.

(NOTE: The aforementioned federal laws [Title VII of the Civil Rights Act, ADA, and Age Discrimination Act] have provisions that broaden their application beyond hiring to include promotion, discharge, compensation, or terms, conditions or privileges of employment. DMA recognizes their application throughout the employment spectrum and is strictly committed to their provisions and protections in all aspects of employment at DMA.)

### *Background Checks*



Any individual who will have unsupervised time with students, including teachers, paraprofessionals, staff members, Board Members, volunteers etc., will be required to submit to a standard criminal background check. Copies of the background check forms and results will be stored in the school office under the supervision of the office staff. The office staff will review all background checks at the beginning of each year to keep them current. A summary of the status of the background checks will be reported to the Director of the school. Background checks will be kept current.



## **7. Human Resources**

### **Staff Development**

Teachers at DMA will be provided numerous opportunities to improve and develop their teaching skills either in a specific curriculum (e.g. Montessori professional development workshops) or in the general practice. The intent behind staff development is to:

- Provide professional development and technical assistance to teachers and administrators in their school-wide implementation of DMA's comprehensive program of instruction
- Focus on meaningful learning and understanding for all students to raise their level of achievement
- Provide follow-up components for professional development to ensure that implementation of the comprehensive program of instruction results in improved student performance

### **Mandatory Reporting**

In situations of neglect, abuse, or abandonment state agencies will be called upon to assist the school.

### **Records**

The files for the staff of DMA will be maintained in two secure places. Each staff member will have a hardcopy file stored on site in a locked fire safe file cabinet in a locked fire safe room, each employee will also have a digital file stored off site in a secure storage with the following information in it:

- Employment Application
- Education Transcripts
- Photocopy of Degree
- Emergency Contact
- Finger printing release
- Child Abuse Statement
- Employment terms
- W-4 form
- I-9 form
- Photo copy of Drivers License
- Photo copy of SSC
- Teacher Handbook Receipt
- Annual Employee Evaluations Forms

- Insurance information
- CACTUS information

## 8. Special Education

DMA intends to be as fully inclusive of all children as is possible fitting with the Montessori Method. While we will try to integrate children with special needs in the classroom, we understand that this is not always possible. Children with behavioral challenges or other special needs will be provided with the faculty and facilities needed in order to comply with their IEPs and their immediate needs. DMA will comply with state and federal requirements for FAPE with all children. When the regular classroom environment cannot meet the needs of a child's IEP small group and individual rooms will be available.

DMA will provide specific rooms where children who need to be kept separate, either temporarily or long term, can be taught and cared for safely. When necessary, for new children or IEP changes for existing students, DMA will access IDEA part B funding to make accommodations. During the interim, DMA will find temporary facilities in order provide IEP requirements.

Dixie Montessori will use the Response to Intervention (RTI) Model based on the work by George Batsche, Ed.D. A handbook of policies and procedures related to RTI model will be developed to guide practice and promote consistency of implementation.

A school-based leadership team (SBLT) made up of the Director, Level Teachers and the referring parent and/or Teacher will function as the SBLT to gather, evaluate, monitor and adjust program to meet the individual students' need.

Data from different sources, along with teacher and/or parent observation will be used to make decisions regarding the student's level of intervention. Progress-monitoring measures may be used to assess a student response to supplemental instruction or the need to intensive instruction or special education. For example, accountability assessment and universal measures may be used to assess the effectiveness of core instruction.

1. DMA will accept all students with disabilities who apply and/or are drawn from the lottery.
2. DMA's Special Education policies and procedures are based on the state model and accessible on the school website.
3. All educators and administrators at DMA will be familiar with and adhere to the Charter School's commitments made in the adopted policies and procedures.
4. Obtaining The special education coordinator for DMA will be tasked with obtaining records from other LEA's and implementing IEPs in a timely manner as defined. IEPs may be re-evaluated as needed to determine if the plan continues to meet the child's educational needs.
5. The IEPs of incoming students will be reviewed to evaluate:
  - a. Suitability of the educational plan and compliance with policies and procedures.

- b. Ensure existing due dates are met.
  - c. Identify current goals and services.
  - d. The state provided content checklist form will be included in every student file to ensure that all documents are present.
  - e. Data in documents for incoming students may not need to be transferred to DMA specific documents if they fulfill the same requirements. They will be updated as IEPs are reviewed and as needed.
6. DMA will use the state provided documents for the required components of IDEA.
  7. Special education files will be kept in a locked closet to ensure the level of confidentiality required under the IDEA and the Family Education Rights and Privacy Act (FERPA). The closet will have an Access Authorization List attached to the outside, showing which LEA personnel have the right to examine the files. These include those persons with a legitimate need to know, such as the school director, the special education teacher(s), and related service providers. On request, the LEA will provide parents with a list of the types and locations of education records collected, maintained, or used by the LEA.
  8. DMA will make offsite backups in and encrypted electronic form of all special education files to ensure the ability to recreate lost files. The access to these backups will be restricted to relevant personnel.
  9. An English Language learner who is suspected of having a disability must be evaluated with appropriate tools and strategies to determine if the student is eligible for special education or special education and related services.
  10. DMA will comply with IDEA part B funding requirements and reporting.
  11. DMA will provide compliance and results reporting to the State Education Agency as required.
  12. DMA will participate in UIPS functions and PIPS. Administrators and educators will periodically review SEA evaluations of DMA special education to continually improve their programs.

## **9. School Closure Plan**

Consistent with Utah Code 53A-1a-510.5, Charter School Closure, DMA is committed to the following school closure plan as required.

Upon notice from the school's authorizer regarding necessity of closure or in the event a public charter school desires to close or become a private school, the school will provide notification of the decision in writing by the school's governing board or the legal designee of such to the State Charter School Board (authorizer), parents of students enrolled at the school, school founders, creditors, the school district in which the school is located and other charter schools within that district. All such notifications must be documented pursuant to establishment of open communications to facilitate the closure or change in status.

The notification shall include the following information:

- Proposed date of school closure,
- The school's plan to help students identify and transition to a new school (included below),
- Contact information for the school during transition (contact person or people, emails and telephone numbers), and
- Schedule of closure events.

The school will follow Utah State Code with regards to the appointment of one or more custodians for the protection of student files, school business records, and other pertinent files and records. Additionally, individuals with knowledge of educational support, finances, and law will be included to facilitate the smoothest transition possible. These items will be maintained throughout the closure calendar at a base of operations equipped with functional telephone service with voice messaging clearly stating hours of operation and appropriate contact information. Appropriate insurance and risk management coverage will also be maintained throughout the transition period and for a time following closure as directed by the chartering entity.

In addition to these activities, the school will complete a thorough financial audit, which includes taking inventory of all assets, developing a list of all creditors, and identifying secured creditors and assets that are security interests. It is the school's primary duty to protect all assets against theft, misappropriation, and deterioration. Any and all assets held subject to written conditions or limitations in accordance with Utah State Code 53A-1a-517 shall be disposed of in accordance to the same. Further, all liabilities and obligations shall be paid and discharged or otherwise adequate provisions made as allowed by school assets. Remaining assets not encumbered by use shall be returned to the chartering entity. The chartering entity may liquidate assets at fair market value or assign the assets to another public school.

All leases, service agreements, and other contractual obligations that are unnecessary in the transition will be terminated upon notice of closure. The school shall submit all required documentation per the original charter agreement, which verifies compliance with the closure order as well as satisfaction of financial issues. Upon closure and dissolution, the chartering entity will conduct a final audit.

With regards to the transition of students to other schools, appropriate district personnel within the Washington County School District and other charter schools will be informed and included as necessary through the process of transitioning students. While DMA reserves the right to change this closure plan after operation begins, the following initial closure draft demonstrates good faith with regard to the potential for closure or change in status to a private school.

In the event the closure takes place after the school year is completed, appropriate district personnel will be informed of the closure as required by Utah State Code. Likewise, as the transition moves forward, district personnel will be invited to participate

in the closure process to ensure a smooth transition for students and to avoid overwhelming district or site personnel. Informational meetings for parents and students will be scheduled for registration and enrollment of elementary students prior to critical deadlines in the district. Additionally, DMA will assist with counseling services for students.

Closure of the school during the school year will be avoided; however, in the event closure occurs mid-year, the disruptive nature of sudden closure will be addressed immediately with the intent to assist the students with a successful finish to the school year. Regardless of circumstances, school personnel or designees will follow up after transfers are complete to ensure students' transition to a new facility is successful, having all of their needs met.

DMA will manage the fiscal integrity of operations by reserving a minimum of three months fixed costs. While the school is committed to this minimum standard, it is a matter of fiscal and governance best practices to secure three percent of the annual budget, including six months fixed costs held in reserve as soon as is feasible. Such preferred figures would ensure avoidance of a mid-year closure and the associated negative repercussions of such. As with other aspects of this closure plan and the charter application in general, the school reserves the right to make changes through the appropriate amendment process as required.

According to Utah State Code 53A-1a-517, a charter school may receive, hold, manage, and use any device, bequest, grant, endowment, gift, or donation of any asset to the school for any of the purposes of this part unless a donor or grantor designates otherwise in writing. This identifies all such items as assets of the charter school. All items purchased with charter school funds are to be included as the school's assets, but the school may not dispose of its assets without providing a uniform dissolution plan in the event of a required school closure, in accordance with Utah State Code 53A-1a-510.5.

The school will maintain accurate records of student enrollment throughout the closure process and for the time period specified by the chartering entity. This information will be kept electronically and in hard copy format in a secured location as soon as it is determined that closure is the only viable option for the school. A secure, locking file cabinet is required for the hard copies, to provide ample security against loss by water or fire damage or by theft. The electronic files must be accessed with logins and passwords and should be backed up daily, or at least weekly, at a minimum.

In compliance with all fiscal practices, the school will keep an accurate account of the school's financial status during and after closure (for the period set forth by the authorizer). The trustee who will officially dissolve the Board under state law, preferably an attorney with experience in business dissolution, will provide this fiscal consideration and is neither a founder nor a current Board Member. The trustee assures supervision of the school's entire closure process and has primary responsibility over archived records. Along with the trustee, key personnel will ensure that complete records for each student are transferred to their new school. The trustee will also ensure that

employment records are updated and archived, the school's assets and liabilities are distributed in a fair and transparent manner, and goods acquired through federal and state grants are properly liquidated. Finally, the trustee will arrange for the final financial audit, oversee the maintenance of student records and submit all end-of-year and other required reports.