

INDIANA STATE BOARD OF EDUCATION

MEMORANDUM

TO: Indiana State Board of Education

FROM: Brian Murphy

RE: Freeway Accreditation: South Bend Montessori High School

DATE: April 15, 2020

Recommendation: Grant the request for immediate freeway accreditation.

Request for Freeway Accreditation

South Bend Montessori High School ("SBM") petitions the SBOE for freeway accreditation with the 2020-21 school year being its first year of operation. IC 20-26-15-13(d) and (e) state that:

- (d) The state board shall accredit a nonpublic school that:
 - (1) becomes a freeway school under this chapter; and
 - (2) complies with the terms of the contract.
 - (e) The state board may accredit a nonpublic school under this section at the time the nonpublic school enters into the contract under subsection (a).

SBOE Action

The SBOE has the discretion to either approve a five-year freeway accreditation contract beginning in 2020-21 or wait one year for IDOE to observe the school's operation and address this issue at a later time.

Overview

SBM will operate in South Bend, Indiana, in an appropriate facility located in the education wing of 1st Presbyterian Church at 333 W. Colfax Ave., South Bend, IN 46601. SMB will serve students in grades 9 – 12 with a maximum capacity of 18 students per grade, resulting in an overall school capacity of 72. SBM plans to serve a socioeconomically diverse student population and will utilize the Montessori method of instruction. SBM will recruit approximately 18 students for grade 9 and will expand from there.

SBM has several teachers and administrators on staff, with resumes attached. Key leadership includes Dr. Eric Oglesbee, Launch Coordinator and Operations Management, Eileen Mariani, Curriculum Developer and Lead Guide, and Patrick Newsom, teacher.

Dr. Oglesbee is in charge of the operations of the school, fundraising and maintaining long-term sustainability, curriculum development, and he will teach. He is a former professor with a B.A. in Mathematics and a M.A. and Ph.D. in Linguistics.

Ms. Mariani is responsible for curriculum development and will serve as one of three initial teachers in the fall. She is a former Indiana public school teacher. Ms, Mariani holds a B.A. with a specialty in Environmental Science and a M.Ed. with a Science Focus. She also holds an upper elementary Montessori Certification.



Patrick Newsom is an Indiana teacher with a background in English, which he will teach at SBM. He has a B.A. in English Literature and Creative Writing and an M.A. in Teaching.

SBM has also assembled a pre-launch board that is responsible for fundraising, including Drexel Grant funds, forging community partnerships, creating a long-term strategic plan, and overall ensuring a smooth and successful startup.

SBM's business plan includes a market analysis and shows a demand for the school in this area.

Academics

SBM will administer the ILEARN statewide assessment and will utilize curriculum aligned to Indiana's 2014 Academic Standards. As mentioned above, the Montessori Method will be used.

Support

As previously mentioned, SBM is a Montessori school and will have the resources that come with being in the Montessori network. Further, SBM received a letter confirming that SBM is in the process of exploring a partnership with the Montessori Wildflower network of schools. The letter states that an affiliation agreement could be signed as soon as May 1, 2020, which will open up additional non-financial resources and supports.

Further, Dr. Oglesbee was awarded a \$140k fellowship for the 2019-2020 academic year to engage in school planning and development. This funding has supported full time work by Dr. Oglesbee and co-founder, Eileen Mariani, as they have developed the curriculum and partnerships needed to successfully launch SBM. At this time SBM is currently an applicant for a 3-year operational startup grant from the Drexel Fund with the following payment schedule:

- \$52,800 in July 2020
- \$42,240 in July 2021
- \$10,560 in July 2022

SBM will receive notification by June 2020 of award status.

Attachments

Attached to this memo you will find the following: 1) key question summary, 2) school mission and objectives, 3) business plan, 4) budget, 5) student-parent handbook, 6) faculty handbook, 7) staff resumes, 8) facility pictures, and 9) Wildflower Network support letter.



Summary of Key Questions For Accreditation During Opening Year

1. Budget Information

A full spreadsheet including expanded income/expense assumptions is available upon request. This budget has been created in consultation with the Drexel Fund. The following is a summary of key budget categories.

iting Bu	dget								
2020	- 2021	2021	L - 2022	2022	- 2023	2023	3 - 2024	2024	- 2025
	1		2		3		4		4
	18		36		52		66		66
	3		5		7		8		8
\$	305,649	\$	503,158	\$	673,220	\$	772,983	\$	789,016
\$	116,755	\$	247,567	\$	367,602	\$	467,091	\$	476,433
\$	52,427	\$	98,772	\$	145,478	\$	192,653	\$	196,506
\$	52,800	\$	42,240	\$	10,560	\$	-	\$	
\$	83,667	\$	114,579	\$	149,581	\$	113,239	\$	116,077
\$	304,126	\$	470,951	\$	631,174	\$	741,153	\$	756,388
\$	1,523	\$	32,207	\$	42,046	\$	31,831	\$	32,628
	\$ \$ \$ \$ \$ \$ \$ \$ \$	3 \$ 305,649 \$ 116,755 \$ 52,427 \$ 52,800 \$ 83,667 \$ 304,126	2020 - 2021 2021 1 18 3 \$ 305,649 \$ \$ 116,755 \$ \$ 52,427 \$ \$ 52,800 \$ \$ 83,667 \$ \$ 304,126 \$	2020 - 2021 2021 2 1 2 18 36 3 5 \$ 305,649 \$ 503,158 \$ 116,755 \$ 247,567 \$ 52,427 \$ 98,772 \$ 52,800 \$ 42,240 \$ 83,667 \$ 114,579 \$ 304,126 \$ 470,951	2020 - 2021 2021 - 2022 2022 18 36 3 5 \$ 305,649 \$ 503,158 \$ \$ 116,755 \$ 247,567 \$ \$ 52,427 \$ 98,772 \$ \$ 52,800 \$ 42,240 \$ \$ 83,667 \$ 114,579 \$ \$ 304,126 \$ 470,951 \$	2020 - 2021 2021 - 2022 2022 - 2023 1 2 3 18 36 52 3 5 7 \$ 305,649 \$ 503,158 \$ 673,220 \$ 116,755 \$ 247,567 \$ 367,602 \$ 52,427 \$ 98,772 \$ 145,478 \$ 52,800 \$ 42,240 \$ 10,560 \$ 83,667 \$ 114,579 \$ 149,581 \$ 304,126 \$ 470,951 \$ 631,174	2020 - 2021 2021 - 2022 2022 - 2023 2023 18 36 52 3 5 7 \$ 305,649 \$ 503,158 \$ 673,220 \$ \$ 116,755 \$ 247,567 \$ 367,602 \$ \$ 52,427 \$ 98,772 \$ 145,478 \$ \$ 52,800 \$ 42,240 \$ 10,560 \$ \$ 83,667 \$ 114,579 \$ 149,581 \$ \$ 304,126 \$ 470,951 \$ 631,174 \$	2020 - 2021 2021 - 2022 2022 - 2023 2023 - 2024 1 2 3 4 18 36 52 66 3 5 7 8 \$ 305,649 \$ 503,158 \$ 673,220 \$ 772,983 \$ 116,755 \$ 247,567 \$ 367,602 \$ 467,091 \$ 52,427 \$ 98,772 \$ 145,478 \$ 192,653 \$ 52,800 \$ 42,240 \$ 10,560 \$ - \$ 83,667 \$ 114,579 \$ 149,581 \$ 113,239 \$ 304,126 \$ 470,951 \$ 631,174 \$ 741,153	2020 - 2021 2021 - 2022 2022 - 2023 2023 - 2024 2024 1 2 3 4 18 36 52 66 3 5 7 8 \$ 305,649 \$ 503,158 \$ 673,220 \$ 772,983 \$ \$ 116,755 \$ 247,567 \$ 367,602 \$ 467,091 \$ \$ 52,427 \$ 98,772 \$ 145,478 \$ 192,653 \$ \$ 52,800 \$ 42,240 \$ 10,560 \$ - \$ \$ 83,667 \$ 114,579 \$ 149,581 \$ 113,239 \$ \$ 304,126 \$ 470,951 \$ 631,174 \$ 741,153 \$

¹⁾ Fundraising will primarily take the form of SGO donations which yield a 50% Indiana tax credit for donors

2. School Location

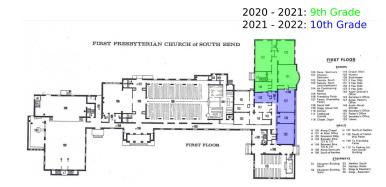
SBMHS will be launching in the vacant education wing of 1st Presbyterian Church located at 333 W. Colfax Avenue, South Bend, IN 46601. A total of 3,000 square feet is currently being

²⁾ SBMHS is currently pursuing Freeway Accreditation for Choice and Tax Credit Scholarship Eligibility

renovated for Year 1, which encompasses 3 classrooms and one office space. The space was formerly an early childhood education center.

Key building safety and access features:

- Security system
- Buzzer/keycode entry
- Fire alarm system
- Individual restrooms
- Exterior ramp access to first floor



There is sufficient open space in the

basement and 2nd floors of the building to grow the high school to its projected capacity (60 - 70 students). The building is designed to be a jumping off point for utilizing community resources as core curriculum elements.

3. Teachers, Staff and Licensing

A. Staffing Numbers

At maturity, SBMHS will employ 7 full-time teachers and one full-time operations support staff member. The school's administrative model is a "Teacher/Leader" approach used by Wildflower Montessori Schools. In this model, teachers each have well-defined administrative responsibilities in addition to their teaching load.

Projected staff growth:

	19-20 (Curriculum Development Year)	20-21 9th Grade Only	21-22 9th, 10th	22-23 9th, 10th, 11th	23-24 9th, 10th, 11th, 12th
Teacher/Leaders		3	5	6	7
Operations Support				1	1
Launch Team	2* *Drexel Fund Supported				

B. Teacher Credentials

Teachers are primarily recruited for content expertise and fit with a Montessori educational philosophy. With financial assistance from SBMHS, all teachers are expected to work toward adolescent Montessori credentialing through a MACTE accredited teacher-training program. Our current training partner is CMSTEP in Cincinnati, Ohio, which provides summer training options.

C. Teacher and Curriculum Developer Backgrounds

The lead curriculum developer and teacher for 2020 - 2021, Eileen Mariani, M.Ed. is a former Indiana public middle and high school science teacher and upper elementary (grade 4 - 6) Montessori teacher. She holds a B.A. from the University of Illinois with a speciality in Environmental Science, a M.Ed. from Indiana University with a Science focus, and an American Montessori Society (AMS) upper elementary Montessori certification from Columbus Ohio Montessori Educational Training (COMET).

The assistant curriculum developer, Dr. Eric Oglesbee, is a former university professor with a B.A. in Mathematics and Biblical Literature and M.A. and Ph.D. in General Linguistics. His regular teaching load during seven years at Bethel University included freshman writing, linguistics, and mathematics, as well as developing and running online courses. During the school's first year, Dr. Oglesbee will manage operations and teach mathematics.

Patrick Newsom, an Indiana-licensed English teacher with a B.A. in English Literature & Creative Writing from Sarah Lawrence College as well as an M.A. in Teaching with a certification in Secondary Humanities Education from Columbia University, Teachers College, will be teaching English during the school's first year.

4. Student Body Description

At maturity, SBMHS is designed to serve 60 - 70 students total in four grades. To reach this target, 18 students are being recruited for the first 9th grade class.

SBMHS is being designed as a "mixed income" school where one-third of seats are reserved for free/reduced lunch families, one-third for middle-income families requiring some level of financial aid, and one-third for full-paying families. Out-of-pocket tuition for families is projected to be capped at 1.5% to 10.0% of Adjusted Gross Income (AGI), depending on household size and family income level.

5. Tuition Levels and Choice Scholarship Utilization

It is estimated that approximately 50% - 60% of families will qualify for some level of Choice Scholarship. Additionally, the development strategy for SBMHS is built around utilizing tax-credit scholarships as the primary vehicle for fundraising.

Full-paying families will be charged \$12,800 for tuition. As stated above, out-of-pocket tuition will be capped at between 1.5% to 10.0% of Adjusted Gross Income (AGI). See attached financial aid worksheet packet for more information.

6. Board of Directors

As of 2/10/20, the board of directors consists of:

- Dr. Eric Oglesbee (Board President)
 - See above for basic biographical information.
- Bruce Jones (Board Vice-President)
 - Bruce Jones is the founder and president of a financial services business that manages investment portfolios for high-income clients. He is also the owner of QuikTax (https://www.quiktaxreturns.com/), a tax preparation business in South Bend, Indiana.
- Eileen Mariani (Board Secretary and Treasurer)
 - See above for basic biographical information.
- Rob Nichols
 - Rob Nichols is an Engineer/Estimator for Rieth-Riley Construction. A former engineering employee for the city of South Bend, Mr. Nichols' role on the board is to negotiate contracts and provide connections to contractors to support development of the school's physical location.
- Hanna Osthimer-Studt
 - Hanna Osthimer-Studt is a recent addition to the SBMHS board and is a staff accountant at Kruggel-Lawton CPA. Ms. Osthimer-Studt will be assuming the role of Treasurer and overseeing financial reporting for SBMHS.

SBMHS is currently recruiting additional board members and is projected to expand to a 7-8 person board by July 2020. The school is receiving consulting support from Board on Track to help with board formation and advice from the director of the Drexel Fund's Founders Program.

For sample board duty description and agreement, see attachments.

In addition to a governing board, the following individuals currently serve on SBMHS's advisory board:

- Sam Centellas, Executive Director of La Casa de Amistad
 - La Casa de Amistad is a prominent Hispanic community center in South Bend.
 Mr. Centellas is providing support for recruiting within the Hispanic community.
- Charles Nelson, Executive Director of Judd Leighton Foundation
 - The Judd Leighton Foundation is a major financial contributor to capital projects in the South Bend region. Mr. Nelson is well-connected and respected within the

community, a former teacher (as his his wife), and is providing advice regarding funding possibilities and community partnerships.

- Marta Donahoe, Founder of Clark Montessori High School
 - Ms. Donahoe was the founder of the first public Montessori high school in the United States (Clark Montessori High School) in Cincinnati, Ohio. She is providing guidance to Eileen Mariani during the curriculum development process.
- Pete McCown, President Community Foundation of Elkhart County
 - Mr. McCown is a former university vice-president and business professor. He currently serves as the president of one of the three largest community foundations in Indiana and is providing executive mentoring to the SBMHS launch team.

7. SBMHS Partners

The following organizations are financial or thought partners in the launch of SBMHS:

- Drexel Fund (https://drexelfund.org/)
 - Dr. Eric Oglesbee is currently a fellow within the Drexel Fund's Founders Program. This \$140k award is currently funding full-time school design and curriculum development. At the conclusion of the fellowship year, SBMHS will be eligible to apply for up to a total of \$100k in additional launch funding from the Drexel Fund that is paid out over the first three years of the school's operation.
- Wildflower Foundation (https://wildflowerschools.org/)
 - SBMHS is currently exploring whether to open within the Wildflower Network of schools as their first high school in the continental United States. In 2018, Alyssum Montessori School – an age 3 through grade 6 member of the Wildflower network in Ft. Wayne, Indiana – was granted freeway accreditation during its first year of operation.
- Mastery Transcript Consortium (https://mastery.org/)
 - SBMHS is a member of the Mastery Transcript Consortium (MTC), an organization with more than 250 members world-wide that is pioneering a gradeless, Mastery Transcript for use in college admissions.
- School Hack LiFT (https://www.schoolhack.io/)
 - LiFT is a novel platform for curriculum delivery that allows for co-creation of content between teachers and students. SBMHS will be working with LiFT to create a custom solution for its curriculum delivery.
- Montessori Consortium of the Great Lakes at Good Shepherd Montessori School (https://montessoriconsortium.org/)
 - SBMHS began as a project of the MCGL, and a current member of the MCGL (Oak Farm Montessori School) has shared its curriculum with SBMHS.
- South Bend Community School Corporation (SBCSC) (http://sb.school/)
 - Initial conversations have taken place with the superintendent and chief academic officer of SBCSC regarding SBMHS students participating in SBCSC

extracurricular activities. The school design model being developed for SBMHS has the potential to be a solution to SBCSC's continuation of Montessori education within its system. Currently, SBMSC offers public Montessori up through 6th grade.

8. Curriculum and Testing Plans

A. Curriculum Design

Traditionally, a Montessori classroom operates on a 3-year curricular cycle in a multiage classroom (e.g., grades 1 - 3, 4 - 6, etc...). There have been a number of ways that schools have attempted to align this approach with a 4-year high school structure:

- Approach #1: Put 9th grade with a 7th and 8th grade in a classroom and operate the high school as grades 10 12.
- Approach #2: Use a two-year curriculum cycle and multi-age classroom for 7th grade and beyond (e.g., 7th-8th; 9th-10th; 11th-12th). Additionally, some schools pair this approach with an International Baccalaureate (IB) program at the 11th and 12th grade levels.

With SBMHS, we are piloting a new structure that to our knowledge has not been attempted:

- A "hybrid 9th" grade that is a one-year curriculum designed to (a) be a capstone for students coming from a Montessori feeder school and (b) be a transition year where students have a year-long introduction to the self-directed learning methods used in a Montessori classroom.
 - An additional design feature is that the 9th grade courses are set to align with the kinds of courses that students typically take during a "traditional" 9th grade high school year. The intent of this is to (a) allow for students to transfer in at 10th grade from a traditional environment if they have previous Montessori experience and (b) make it possible for families to transfer out after 9th grade if they find that SBMHS is not a fit for their family.
- A 10th 12th grade, 3-year curriculum that utilizes area colleges and universities for advanced work at the 11th and 12th grade levels.
 - SBMHS will not accept transfers in for 11th or 12th grade unless there are exceptional circumstances.

In designing the curriculum, the Indiana Core 40 diploma with associated course descriptions and standards will be a core reference point. It will be an ongoing process as we work to align a Mastery-based assessment approach to IDOE course standards in a multi-age, Montessori environment. The Montessori Transcript Consortium (MTC) and School Hack LiFT team are key partners in this work. Additionally, our decision to significantly over-staff the school in its early years will provide teachers with significant curriculum development time and the flexibility to adapt.

B. Testing Plan

Students will take PSAT and either the SAT or ACT exams. Data from these tests will be used to inform curricular modifications. We are planning to offer PSAT and SAT/ACT preparation courses as an after school elective.

9. Elective Suspension of Statutes and Rules in Freeway School Contract

10. Background Check Compliance

Prior to engaging in employment activities, SBMHS employees must complete an expanded criminal background check that meets Indiana state requirements. We intend to use a service such as: http://www.indianaschoolbackgroundchecks.com/. Final determination of which service to be used will be made in April/May.

11. Grades Offered at SBMHS

Beginning with the 2020 - 2021 school year, SBMHS will offer only grade 9. Each year thereafter, a new grade will be added (e.g., grade 10 for 2021 - 2022, grade 11 for 2022 - 2023, etc...).

12. History (Adapted from high school website, SouthBendMontessori.org)

2002

GOOD SHEPHERD MONTESSORI SCHOOL (GSMS)

The story of SBMHS begins one mile east from its launch location on Colfax Avenue at Good Shepherd Montessori School (GSMS).

Since its founding in 2002 with 16 children in a single classroom, the guiding vision for Good Shepherd Montessori School has been to foster world peace and work toward global justice – both by serving the children within its doors and striving to improve the surrounding community.

In 2007, with enrollment having reached 80 students, discussions began about how to share the transformational experience of Good Shepherd with the wider education community. Out of these discussions came the idea of building a consortium of schools to support research into Montessori methodology and foster collaboration among educators. Over the next five years, as GSMS enrollment grew to 125 children and Junior High (2009) and Primary (2012) classrooms were added, building a consortium became more than just an idea.

2012

GREAT LAKES REGIONAL MONTESSORI CONSORTIUM

In 2012, members of the Good Shepherd community formally came together and launched the Great Lakes Regional Montessori Consortium at Good Shepherd Montessori School. Later, in November of that same year, the consortium hosted its inaugural public event at GSMS, a daylong conference exploring the foundations of a Montessori education. In subsequent years, the consortium facilitated visits to the GSMS campus as a part of courses offered at area colleges and universities, including the University of Notre Dame and Holy Cross College.

2016

MONTESSORI CONSORTIUM OF THE GREAT LAKES (MCGL)

Based on the consortium's growth trajectory and GSMS's strong track record in educational excellence, in Fall 2015 the Dekko Foundation awarded GSMS a grant to continue developing the consortium. In January 2016, Dr. Eric Oglesbee joined the project, the consortium took on a new name – Montessori Consortium of the Great Lakes – and the first public event since the 2012 conference was scheduled – a symposium hosted at GSMS with David Kahn, a world-recognized expert in Montessori adolescent education.

GSMS HIGH SCHOOL FEASIBILITY WORKING GROUP

Concurrent with the launch of the MCGL, from January - June 2016 a group of GSMS current/former parents, administrators, and board members led by Eileen Mariani and Daniel Driscoll met on a regular basis to explore the feasibility of extending GSMS into Grades 9 - 12. The product of the working group's efforts was a feasibility study that both supported the viability of a Montessori high school in South Bend and outlined key challenges that would need to be met. Based on feedback received from GSMS stakeholders during the process, it was determined that school resources would be better used to continue enhancing current programming as opposed to launching a high school.

2018

WILDFLOWER FOUNDATION & DREXEL FUND

Through conversations with MCGL members and thought partners, it became clear that solving the problem of creating small-scale, replicable, sustainable Montessori high schools was both a national-level need and challenge. In early 2018, conversations began with both the Wildflower Foundation and Drexel Fund about supporting the development and launch in South Bend of a new model for Montessori high school education. Later that year, the Executive Director of the MCGL – Dr. Eric Oglesbee – was awarded \$140,000 in funding from the Drexel Fund to support a one-year curriculum development and school planning process. Conversations continue with the Wildflower Foundation as to whether SBMHS will open as Wildflower's first high school in the continental United States.

2019

CURRICULUM DEVELOPMENT & SCHOOL PLANNING

Beginning July 2019, Eileen Mariani – a former high school science teacher and long-time GSMS Upper Elementary guide – joined the launch team of SBMHS in the role of lead curriculum developer. Aiding this process is the School Hack LiFT team and resources made available to SBMHS as a part of its membership within the Mastery Transcript Consortium.

13. Mission and Values

We exist to meet the developmental needs of adolescents by educating high school students through the Montessori Method in a mixed-income, community-oriented environment.

We accomplish this through our commitment to the following core values:

- Montessori
 - I seek independence.
 - I nurture my spiritual self.
 - I embrace failure within learning.
- Equity
 - I acknowledge differences.
 - I respond to individual needs.
 - I take action against injustice.
- Service
 - I help when needed.
 - I practice civic responsibility.
 - I engage in service opportunities.
- Self
 - I learn for joy.
 - I do before asked.
 - I have the power of choice.
- Community
 - I use my voice.
 - I disagree respectfully.
 - I pursue universal flourishing.

14. Academic Objectives

The fundamental goal of a SBMHS education is to prepare students for "what's next," whether that is attending a college/university, pursuing a trade, or something else (e.g., starting a

business). This broad goal means that there are specific outcomes unique to each student. Sample possible unique outcomes include:

- if planning to attend college or university, a level of performance on the SAT/ACT that aligns with a target college or university the student desires to attend.
- if planning to enlist in the armed forces, a level of performance on the ASVAB that qualifies a student to join enlist in the military branch of his/her choice,
- if planning to start a business after graduation, developing a product prototype or successfully designing and executing a pilot of a potential money-making service,
- if planning to enter the trades, engagement in pre-apprenticeship training prior to graduation.

Regardless of post-graduation plans, there are universal targeted outcomes that apply to all students:

- completion of all requirements for an Indiana Core 40 aligned diploma,
- demonstrated capacity to manage personal finances, and
- creation of a 5-year post-graduation action plan for career and life development.

In addition to the mastery-based assessment methods used for coursework at SBMHS, all students will participate in PSAT (10th grade) and SAT (11th grade) testing so as to have a nationally norm-referenced achievement standard for English Language and Mathematics performance.

- At a full group level, the target is for the SBMHS median score to exceed national median.
- Additionally, a secondary achievement standard is for all students who intend to attend a college or university following graduation to score in the 75th-percentile or better on both the PSAT and SAT.

The rationale for these achievement standards is that although many colleges and universities are becoming "test optional," it is still the case that many initial admission decisions and financial aid offerings are connected to performance on standardized test scores. To support these achievement standards, the current plan is to offer optional PSAT/SAT preparation sessions during the 4:00 - 5:00 p.m. time slot as well as to have PSAT/SAT preparation be an option during open work times.

Indiana Freeway Accreditation Checklist Materials

February 10, 2020 Dr. Eric Oglesbee



(1) School's Mission Statement & Academic Objectives

We exist to meet the developmental needs of adolescents by educating high school students through the Montessori Method in a mixed-income, community-oriented environment.

We accomplish this through our commitment to the following core values:

Montessori

- I seek independence.
- · I nurture my spiritual self.
- · I embrace failure within learning.

Equity

- · I acknowledge differences.
- · I respond to individual needs.
- I take action against injustice.

Service

- I help when needed.
- I practice civic responsibility.
- I engage in service opportunities.

Self

- · I learn for joy.
- · I do before asked.
- I have the power of choice.

Community

- I use my voice.
- · I disagree respectfully.
- I pursue universal flourishing.

The fundamental goal of a SBMHS education is to prepare students for "what's next," whether that is attending a college/university, pursuing a trade, or something else (e.g., starting a business). This broad goal means that there are specific outcomes unique to each student. Sample possible unique outcomes include:

- if planning to attend college or university, a level of performance on the SAT/ACT that aligns with a target college or university the student desires to attend,
- if planning to enlist in the armed forces, a level of performance on the ASVAB that qualifies a student to join enlist in the military branch of his/her choice,

- if planning to start a business after graduation, developing a product prototype or successfully designing and executing a pilot of a potential money-making service,
- if planning to enter the trades, engagement in pre-apprenticeship training prior to graduation.

Regardless of post-graduation plans, there are universal targeted outcomes that apply to all students:

- completion of all requirements for an Indiana Core 40 aligned diploma,
- · demonstrated capacity to manage personal finances, and
- creation of a 5-year post-graduation action plan for career and life development.

In addition to the mastery-based assessment methods used for coursework at SBMHS, all students will participate in PSAT (10th grade) and SAT (11th grade) testing so as to have a nationally norm-referenced achievement standard for English Language and Mathematics performance.

- At a full group level, the target is for the SBMHS median score to exceed national median.
- Additionally, a secondary achievement standard is for all students who intend to attend
 a college or university following graduation to score in the 75th-percentile or better on
 both the PSAT and SAT.

The rationale for these achievement standards is that although many colleges and universities are becoming "test optional," it is still the case that many initial admission decisions and financial aid offerings are connected to performance on standardized test scores. To support these achievement standards, the current plan is to offer optional PSAT/SAT preparation sessions during the 4:00 - 5:00 p.m. time slot as well as to have PSAT/SAT preparation be an option during open work times.

(2) Demographic data of the school and the community it serves

SBMHS will launch in the 46601 zip code in South Bend, Indiana. According to the 2017 American Community Survey:

- median Income is \$18,054,
- 51.4% of families below the poverty level have a child under the age of 18 in the home, and
- there are an estimated 336 children of high school age.

Although located in a particular neighborhood, SBMHS is expected to be a regional draw with many students commuting into downtown South Bend to attend. The school is located near public transit and commuter bike routes. In comparison to the 46601 zip code, the city of South Bend has:

- median income of \$37,441,
- 31.8% of families below the poverty level have a child under the age of 18 in the home,
 and
- there are an estimated 5,975 children of high school age (86.7% public school; 13.3% private school).

Approximately 6,500 people live in the 46601 zip code with the following racial distribution:

- Black or African American: 48.3%
- White (non-Hispanic): 44.6%
- Hispanic: 5.5%
- Other Minority: 1.6%

More broadly, the city of South Bend has an estimated population of approximately 102,000 people with the following racial distribution:

- White (non-Hispanic): 53.9%
- Black or African American: 26.0%
- Hispanic or Latino: 14.4%
- Other Minority: 5.7%

By intentional design, 1/3 of seats at SBMHS will be reserved for families who qualify for free or reduced lunch to attend at an out-of-pocket cost ranging from 1.5% to 4.0% of household Adjusted Gross Income (AGI). An additional 1/3 of seats are reserved for families from middle income backgrounds who will utilize either school choice or tax-credit scholarships.

(3) School Curriculum Aligned to Indiana Standards

SBMHS is currently developing a two-part curriculum within a Montessori framework: a "hybrid 9th" curriculum that is designed to be accessible to individuals who have not previously attended a Montessori school, and a 10th – 12th curricular cycle.

Using the high school curriculum provided by Oak Farm Montessori School for reference as well as materials provided by the founder of The Montessori High School at University Circle, the SBMHS curriculum will align with Indiana Core 40 standards as implemented within a Mastery-based assessment framework. An agreement with David Kahn, founder of Montessori High School at University Circle, has been entered into where he will provide feedback regarding fidelity to Montessori pedagogy as well as input regarding previous approaches to adolescent Montessori education. Marta Donahoe, founder of Clark Montessori High School, the first public Montessori high school in the United States, is providing consulting support regarding the developmental needs of adolescents as they relate to the academic curriculum.

The curriculum will be implemented within the LiFT platform (https://www.schoolhack.io/) with the intent of using the Mastery Transcript being developed by the Mastery Transcript Consortium (https://mastery.org/) as the primary reporting tool for colleges, universities, trade schools, and employers. These platforms will allow for cross-curricular connection of dispositions and standards to artifacts generated by students for assessment.

For the 9th grade year, the following are projected required course offerings:

- Mathematics (Pre-Algebra, Algebra I, Algebra II student enrollment dependent on placement)
- English 9
- Biology I
- Spanish (Level to be determined by placement assessment)
- Physical Education
- Health and Wellness

Additional electives may be offered depending on student interest and access to expertise.

(4) Licensed Teachers Administer Standardized Assessments

SBMHS will utilize the PSAT and SAT as its standardized exams to assist in evaluating academic preparedness and to support college admissions. Patrick Newsom, SBMHS's Humanities teacher for the 2020 - 2021 academic year, currently possesses an Indiana Teacher's License. Additionally, SBMHS co-founder and science teacher, Eileen Mariani, is currently pursuing renewal of a lapsed Indiana teacher's license so as to support activities which require a licensed Indiana teacher.

(5) Preliminary state assessment data and any national normed test results

As SBMHS is opening in Fall 2020 with its first 9th grade class, no test results are currently available.

(6) Plan for Indiana Academic Honors Diploma

To support the core curriculum being developed on site at SBMHS, local colleges and universities (e.g., the REACH program at Bethel University) will be utilized at the 11th and 12th grade levels as a pathway for students to complete Honors diploma requirements, in particular the 3-dual credit pathway.

 Additionally, programs such as Bethel University's REACH program will be used to supplement the base curriculum offered through SBMHS. The cost of these opportunities is currently built into tuition (i.e., no additional fee for families to utilize these opportunities).

(7) School plan to meet educational benefits: Attendance/ Grad Rate/Pass Rate

A core design element of SBMHS is creating the conditions for students to have meaningful connections to both peers and teachers, which in turn is expected to support attendance, graduation rate, and pass rate. Specific activities in each category include:

Attendance

- Students will be contacted individually if tardy/absent on the day of the tardy/ absence.
- Small class sizes will create many opportunities for strong peer and teacher connections, which in turn will serve as a motivating factor for students to attend.
- Healthy food options will be available to all students at any time within the 8:00 a.m. 5:00 p.m. window when the building is open.

Graduation Rate

- Use of LiFT platform and Mastery Transcript will generate live data that teachers can use to track student progress toward graduation.
- Each student will belong to an "advisory group" of 8 12 students that is overseen by a single faculty member. This faculty member will have a multi-year perspective and relationship with the student which will eliminate the chance that a student "falls through the cracks" when it comes to meeting graduation requirements.
- The design of the curriculum allows for an additional year of high school (if needed) to complete graduation requirements.

Pass Rate

 The multi-year, self-paced approach to core curricula gives teachers flexibility in the pacing of content presentations and assessment. This allows students plentiful opportunities to seek assistance and work through material that they find challenging.

(7a) School strategy on measuring student performance

Student performance will be assessed in academic and social/emotional dimensions.

Academic

- The LiFT platform will allow teachers to rapidly assess student work on a day-today basis and engage students in conversation about their performance. Dialog with students about their work through both comments and resubmission of material that does not meet mastery standards will be the primary mechanism for assessing academic performance.
- PSAT and SAT scores will be used as an additional data point regarding academic performance.

Social/Emotional

• In addition to being an aggregator of student work and a platform for providing feedback, the LiFT system also engages students in self-assessment questions that allow teachers to track social/emotional dimensions of a students' experience.

 Regular "Community Meetings" provide an opportunity to gauge the health of student relationship to the community and its guidelines.

(7b) School strategy on measuring student achievement and growth

The Montessori environment at SBMHS has a dual focus: (a) engagement of students in developing mastery of academic content that is aligned with an Indiana Core 40 diploma and (b) development of an individualized, student-focused growth plan that prepares each student for "what's next" after high school. This growth plan encompasses academic, social, spiritual, and vocational dimensions of life after high school.

Strategy for Core 40 Content Mastery

- It is projected that overall at least 50% 75% of instructional time over the course of 4 years will be dedicated to supporting students in demonstrating mastery of coursework that aligns with an Indiana Core 40 diploma.
 - With the remaining instructional time, students will have the capacity to
 engage in learning experiences which further support their post-graduation
 goals. This may include additional effort toward Core 40 requirements (if
 necessary), elective courses, dual-credit college courses, apprenticeships,
 and/or other educational experiences.

Strategy for Growth Plan

- In consultation with his/her advisor, at the beginning of each academic year students will identify measurable goals in each of the following four categories
 - Academic (academic course performance)
 - **Social** (community service and school-internal relationships)
 - **Spiritual** (moral, ethical, or religious experience or learning)
 - Vocational (preparation for post-secondary experience, including college/ university if applicable)
- In addition to revisiting the long-term growth plan on at least an annual basis, students will engage in short-term goal setting for each of the five "themes" within which academic content is presented (see school calendar for 2020 - 2021 projected themes).
- Student growth plans will be embedded within LiFT, allowing for teachers and advisors to have access to individual student goals while conducting check-ins and evaluating artifacts of student work.

(8) Curriculum Strategies for Character, Hygiene, Alcohol, Drugs, STD, Honesty, respect and abstinence and restrain instruction.

The above topics are currently scheduled to be either (a) planned agenda items within the regular "Community Meeting" structure of the school week or (b) topics for presentation within the academic time blocks in the weekly schedule. The framework for discussing each topic will be the 15 "I" statements within the mission and values of SBMHS:

Montessori

- I seek independence.
- · I nurture my spiritual self.
- · I embrace failure within learning.

Equity

- · I acknowledge differences.
- I respond to individual needs.
- I take action against injustice.

Service

- I help when needed.
- · I practice civic responsibility.
- I engage in service opportunities.

Self

- I learn for joy.
- I do before asked.
- I have the power of choice.

Community

- I use my voice.
- · I disagree respectfully.
- · I pursue universal flourishing.

Instruction will conform to the standards outlined for Health and Wellness within the Indiana State Academic Standards.

(9) Freeway statutes suspended by school identified: IC 20-26-15-5

(10) Integrate technology in instruction

Technology is a cornerstone of the education process at SBMHS. Students will be issued a MacBook Air to support use of the LiFT platform for curating coursework evidences and classrooms will be equipped with Airplay devices. Additionally, SBMHS currently has a grant application under review by Choicelight to have a dark fiber connection run to the school's location which will serve a hi-speed wired and wireless internal network being designed for the school. Lastly, lessons on responsible technology use will be integrated into the curriculum as a fundamental skill and will be modeled by school personnel.

(11) Safe and disciplined learning environment plan/ procedure

A feature of Montessori classrooms is that at the beginning of the academic year a community meeting takes place where students and teachers collaborate to create the guidelines for a safe and disciplined environment.

From the Student Handbook:

Discipline

Students are expected to conduct themselves with respect for their community and their environment. Respect does not allow for abusive language or destructive behavior either toward another or toward oneself. If a lack of respect occurs, the student will be asked to step aside and speak to an adult. Any concerns will be reported to the parents. SBMHS follows the Value Statements for Community: I use my voice, I disagree respectfully, and I pursue universal flourishing in each area in which we work. Students create guiding principles as a community and are expected to follow those throughout the year.

Failure to abide by established community guidelines will be met with a proportional response, ranging from temporary loss of privileges up to temporary or permanent removal from the SBMHS academic environment. In the case of expulsion (i.e., permanent removal from the environment), copies of a formal report outlining the rationale for expulsion will be submitted to the student, parent, and board of trustees within 3 business days of occurrence.

(12) Plan continued professional staff development

Teaching staff who do not possess a secondary Montessori credential are expected to complete a MACTE accredited training program within 4 years of the beginning of employment at SBMHS. If training is completed at a preferred training program (e.g., CMStep), SBMHS will cover tuition and reasonable living expenses.

All staff receive an annual discretionary professional development budget of \$350/year to use toward webinars, book purchases, and/or conference registration. This budget may roll over for up to 3 years (e.g., \$1,050). Additionally, staff may request additional funds to augment this individual professional development budget.

SBMHS intends to affiliate with the Wildflower network of schools (WildflowerSchools.org) and also join the Montessori Consortium of the Great Lakes (MontessoriConsortium.org). Both of these organizations have mechanisms for connecting SBMHS faculty to educators in other secondary Montessori environments to facilitate professional growth, and staff will be encouraged to participate.

(13) 180 instructional days with calendar attached next school year

The school day at SBMHS will run from 9:00 a.m. - 4:00 p.m. according to the attached 2020 - 2021 academic calendar and daily schedule. This calendar contains 174 full days with 6.5 hours/day of instructional time, for a total of 1,131 instructional hours. This is equivalent to 188.5 instructional days with 6.0 hours/day of instructional time.

South Bend Montessori High School Annual Calendar 2020-2021

Week 0	August 17 August 20	First Day for Guides First day for Tuesday
Week 1	August 24-28	Cycle Week 0 Leadership and Community Building
Week 2	August 31-Sept.4	Cycle Week 1-1 Kick-Off – Connection Theme
Week 3	September 7 September 8-11	Labor Day - No School Cycle Week 2-1 Connection
Week 4	September 13-18	Cycle Week 3-1 Connection
Week 5	September 21-25	Cycle Week 4-1 Connection
Week 6	Sept. 28-Oct. 2	Cycle Week 5-1 Connection
Week 7	October 5-9 October 8 October 9	Cycle Week 6-1 Connection End of Cycle Project Connection Culminating Activity
Week 8	October 12 October 13-14 October 15-16	Columbus Day - No School Passion Project Fall Break - Teacher Records
Week 9	October 19-23	Cycle Week 1-2 Kick-Off - Meaning and Purpose Theme
Week 10	October 26-30 October 30	Cycle Week 2-2 Meaning and Purpose Guide/Parent/Student Conferences
Week 11	November 2-6	Cycle Week 3-2 Meaning and Purpose
Week 12	November 9-13	Cycle Week 4-2 Meaning and Purpose
Week 13	November 16-20	Cycle Week 5-2 Meaning and Purpose
Week 14	November 23-27 November 23 November 24 November 25-27	Cycle Week 6-2 Meaning and Purpose End of Cycle Project Meaning and Purpose Culminating Activity Thanksgiving Break – No School

Week 15	Nov. 30-Dec.4	Intersession Week 1
Week 16 Week 17	December 7-11 December 14-18 December 18 Dec. 21-Jan.3	Intersession Week 2 Intersession Week 3 Record Day Winter Break
Week 18	January 4-8	Monday January 4 – Classes Resume Cycle Week 1-3 Kick-Off – Creativity Theme
Week 19	January 11-15	Cycle Week 1-3 Rick-Oil – Creativity Therie Cycle Week 2-3 Creativity
Week 20	January 18-22 January 18	Cycle Week 3-3 Creativity Martin Luther King, Jr. Day – No School
Week 21	January 25-29	Cycle Week 4-3 Creativity
Week 22	February 1-5	Cycle Week 5-3 Creativity
Week 23	February 8-12 February 11	Cycle Week 6-3 Creativity End of Cycle Project
	February 12	Creativity Culminating Activity
Week 24	February 15-19 February 15	Cycle Week 1-4 Kick-Off – Transcendence President's Day – No School
Week 25	February 22-26	Cycle Week 2-4 Transcendence
Week 26	March 1-5	Cycle Week 3-4 Transcendence
Week 27	March 8-12	Cycle Week 4-4 Transcendence
Week 28	March 15-19	Cycle Week 5-4 Transcendence
Week 29	March 22-26 March 25 March 26	Cycle Week 6-5 Transcendence End of Cycle Project Transcendence Culminating Activity
Week 30	March 29-Apr.2 March 30-31 April 1 April 2	***(Monday) Teacher Record Days Guide/Parent/Student Conferences Good Friday – No School – Begins Spring Break
	April 5-9	Spring Break
Week 31	April 12-16	Cycle Week 1-5 Kick Off – Initiation Theme
Week 32	April 19-23	Cycle Week 2-5 Initiation
Week 33	April 26-30	Cycle Week 3-5 Initiation
Week 34	May 3-7	Cycle Week 4-5 Initiation
Week 35	May 10-14	Cycle Week 5-5 Initiation

Week 36	May 17-21 May 20 May 21	Cycle Week 6-5 Initiation End of Cycle Project Initiation Culminating Activity
Week 37	May 24-28	End of Year Community Event
Week 38	May 31-June 4 May 31 June 1	*** Memorial Day Last Student Day

	TYPICAL WEEKLY SCHEDULE							
8:00	8:00							
8:15		Building	g Open (Student Fle	x Time)				
8:30 8:45								
9:00								
9:15								
9:30	Academic Block	Academic Block	Academic Block	Academic Block	Academic Block			
9:45	#1	#4	#7	#10	#13			
10:00	& Community	& Community	& Community	& Community	& Community			
10:15	Meeting	Meeting	Meeting	Meeting	Meeting			
10:30								
10:45								
11:00 11:15	Advisory/Health	Advisory/Health	Advisory/Health	Advisory/Health	Advisory/Health			
11:30	Lunch	Lunch	Lunch	Lunch	Lunch			
11:45								
12:00 p.m.								
12:15								
12:30								
12:45	Academic Block	Academic Block	Academic Block	Academic Block	Academic Block			
1:00	#2	#5	#8	#11	#14			
1:15								
1:30								
1:45								
2:00								
2:15								
2:30	Academia Disele	Anadomia Disale	Academia Disale	Academia Disale	Academia Disal			
3:00	Academic Block #3	Academic Block #6	Academic Block #9	Academic Block #12	Academic Block #15			
3:15								
3:30								
3:45								
4:00								
4:15	Pulldian On an (OL deat Flag Time)							
4:30	Building Open (Student Flex Time)							
4:45								
5:00	Building Closes							

(14a) Ability to complete all required data collections

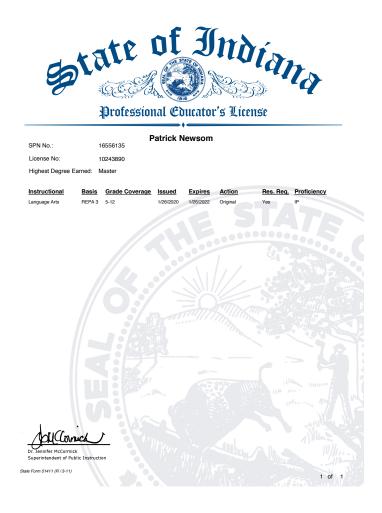
SBMHS co-founder Dr. Eric Oglesbee is an experienced researcher with HIPPA compliance experience.

(14b) Teachers and administrators credentials and license information

Dr. Eric Oglesbee does not possess an Indiana teaching license; however, he does possess 7.5 years of teaching experience at Bethel University in the areas of written communication, mathematics, and linguistics.

Eileen Mariani's Indiana Teacher's License lapsed during her 13 years teaching at Good Shepherd Montessori School in South Bend, Indiana. She is currently pursuing reinstatement.

Patrick Newsom (founding Humanities teacher) possesses an active Indiana Teacher's License.



(15) Criminal background check policy for school personnel

Prior to engaging in employment activities, SBMHS employees must complete an expanded criminal background check that meets Indiana state requirements. We intend to use a service such as: http://www.indianaschoolbackgroundchecks.com/. Final determination of which service to be used will be made in April/May.



SBMHS Business Plan for Drexel Fund Startup Grant

Last Revision: 1/28/2020

Contact

Dr. Eric Oglesbee Co-Founder eoglesbee@SouthBendMontessori.org

SCHOOL DESCRIPTION

A. School Name

South Bend Montessori High School (SBMHS)

B. School Location

For the 2020 - 2021 school year, SBMHS will be located within the education wing of 1st Presbyterian Church (333 W. Colfax Ave., South Bend, IN 46601) near downtown South Bend, Indiana. The school will incubate in this location for at least the first two years of operation. There is capacity at this location to expand to full size prior to selecting a permanent location.

C. School Mission and Vision Statements

We exist to meet the developmental needs of adolescents by educating high school students through the Montessori Method in a mixed-income, community-oriented environment.

We accomplish this through our commitment to the following core values:

Montessori

- I seek independence.
- · I nurture my spiritual self.
- · I embrace failure within learning.

Equity

- I acknowledge differences.
- · I respond to individual needs.
- · I take action against injustice.

Service

- I help when needed.
- I practice civic responsibility.
- I engage in service opportunities.

Self

- · I learn for joy.
- · I do before asked.
- · I have the power of choice.

Community

- I use my voice.
- · I disagree respectfully.
- · I pursue universal flourishing.

D. Student Body Description

SBMHS is a private "micro" high school serving students in grades 9 - 12. The school will have a maximum capacity of 18 students per grade, resulting in an overall school capacity of 72

students at maturity. To facilitate access to the school by students who have not previously attended a Montessori school, grade 9 contains a standalone "hybrid" curriculum that provides a year-long introduction into self-directed learning.

To promote socio-economic diversity within the student body, by design one-third of seats are reserved for low-income, middle-income, and high-income families, respectively. Additionally, a target goal of SBMHS is that at maturity both student body and faculty demographics align with the area immediately surrounding the school, which is 50% black, 45% white, and 5% hispanic.

E. Instructional Philosophy

SBMHS is rooted within the child-centered educational philosophy articulated by Dr. Maria Montessori in the early 20th century, commonly known as the "Montessori Method."

At its core, the Montessori Method works from three key principles. First, every child has the capacity to "self-construct" knowledge if provided with a suitably prepared learning environment and carefully constructed educational materials. Second, children pass through well-defined developmental phases which have a profound effect on the kinds of questions a child is both equipped to ask and discover answers to. Third, classrooms are constructed according to the developmental needs of the child, which in practice calls for 3-year groupings of students (e.g., 1st - 3rd; 4th - 6th; 7th - 9th; 10th - 12th).

Although the Montessori Method is highly specified through the 6th grade level, for adolescents (grades 7 - 12), it is an approach that continues to evolve, as there are few examples of Montessori middle or high schools. One practice that has emerged in some schools is the adoption of 2-year groupings of students and/or integration of International Baccalaureate (IB) programs. SBMHS is unique in that it implements a 1-year, stand alone 9th grade classroom but maintains the 3-year grouping for 10th - 12th grades with no IB diploma integration.

With respect to educational outcomes, the base curriculum of SBMHS is designed to meet Indiana Core 40 diploma requirements. Through the use of competency-based assessment approaches that allow for rapid movement through content standards, the target is for students to have between 25% - 50% of their time available for engaging in customized learning activities that prepare them for their chosen post-secondary career path (e.g., trade school, starting a business, college, etc...), promote spiritual growth, and deepen social connections to the surrounding community.

F. Faith Formation and Character Development Approach

SBMHS is founded within the cultural and spiritual heritage of Good Shepherd Montessori School (GSMS) in South Bend, Indiana.

Through grade 6, GSMS uses the Catechesis of the Good Shepherd (a Montessori approach to Catholic faith formation) to foster spiritual growth within the Christian tradition. For 7th and 8th grades, students participate in theology courses and lead a weekly Morning Prayer service.

At SBMHS, as opposed to focusing on corporate faith formation within a particular tradition, students are invited to grow within – or discover – their spiritual life. This takes place through assignments built around dialog with local faith leaders as well as opportunities to learn theology as it is presented through different lenses (Christian, Muslim, Jewish, etc...).

G. Key Leadership

SBMHS operates within the Teal organizational structure used by Wildflower Schools where administrative tasks are shared and individuals take on well-defined roles to support the operation of the school. The operational and curricular guiding visions, which are fundamental to the structure and operation of the school, are provided by Eric Oglesbee and Eileen Mariani.

Eric Oglesbee, Ph.D. | Launch Coordinator and Operations Management Eric is responsible for managing the logistics involved with launch and initial operation of the school. Coming from a multidisciplinary teaching background in higher education and with experience in entrepreneurship, fundraising, and systems design, Eric is managing the financial health of SBMHS and developing the replicable, sustainable systems for long-term operation.

Eileen Mariani, M.Ed. | Curriculum Developer and Lead Guide

A former high school science teacher and long-time Montessori guide, Eileen is responsible for designing the base curriculum for SBMHS. When the school launches in Fall 2020, she will be one of three initial teacher/leaders and will teach the science components of the curriculum.

GOVERNANCE AND MANAGEMENT STRUCTURE

A. Proposed or Existing Relationships With Sponsoring Organizations or Educational Management Organizations

As of January 2020, SBMHS is exploring the possibility of opening within the Wildflower Schools network. Founded in 2014, Wildflower Schools is a network of locally managed Montessori micro schools that adhere to nine core principles (https://wildflowerschools.org/our-principles/):

- An Authentic Montessori Environment
- A Teacher-Led School
- A Shopfront Setting
- A Laboratory For Innovation
- A Seamless Learning Community
- A Commitment to Equity
- · An Attention to Beauty
- · A Focus on Nature
- A Decentralized Network

The majority of Wildflower schools serve pre-K or lower elementary aged children. If SBMHS opens as a school within the network – which appears likely – it would be the second Wildflower school in the Indiana hub and the first Wildflower high school within the continental United States.

B. Proposed or existing contracts for business, operational or instructional services

SBMHS is currently negotiating use of the School Hack LiFT platform for curriculum development, delivery, and assessment of mastery. Additionally, SBMHS has joined the Mastery Transcript Consortium (MTC) as a dues paying member and will be using MTC's grade-less Mastery Transcript as its primary reporting tool of learning outcomes to colleges, universities, and employers.

C. Division of responsibilities between sponsoring organization (if applicable), governing board, and administrators and how the board will hold management accountable

As a member of the Wildflower Schools network, one seat on the board of directors is reserved for a teacher/leader from another school within the Indiana hub of Wildflower Schools. Wildflower requires this cross-connection to facilitate cohesiveness between network schools and provide each board with an objective voice that can speak to a local school's fidelity to the nine core principles stated above. Because of the school operating under a "Teal"

organizational structure, one staff member will also serve as CEO and will be responsible for implementing board guidance on a day-to-day basis.

Because of the unique organizational structure of a Wildflower School, a part of the board-vetting process will include verifying that prospective board members are both (a) familiar with Teal practices, and (b) agree to use them in providing oversight of the school.

D. Listing of board members and description of each board member's expertise in key areas, including representation of local constituencies and fundraising capacity (consider including a talent matrix).

Primary Board Roles (members may fulfill more than one):

- Montessori Fidelity | Montessori training or significant familiarity with Montessori philosophy through personal experience (long time Montessori school student parent or staff member)
- **Fundraising** | Multiple connections to potential donors with significant capacity or own significant capacity and willingness to give
- **Human Resources** | Formal experience in managing Human Resources, preferably in an educational environment
- Financial Management | Formal accounting training or significant business experience
- Legal Expertise | Lawyer preferably with non-profit and/or educational institution experience

Pre-Launch Board: January 2020 - June 2020

- A 5-7 person Founding Board will work together to:
 - Support pursuit of Freeway Accreditation through the state of Indiana in order to make SBMHS eligible to receive Indiana School Choice and tax-credit Scholarships.
 - Raise a total of \$300k in launch funding by June 30, 2020:
 - \$100k in start-up funds for classroom materials
 - \$100k in tax-credit scholarship funds
 - \$100k in operating cash
 - Establish community partnerships that support the place-based curriculum being designed for SBMHS.
 - Support ongoing work on the 2020 2021 operating plan and associated contingencies.
 - Refine the initial vision for a 5-year strategic plan.
 - Participate in learning activities that support board member understanding of Teal organizational structures as implemented by Wildflower Schools and described by Frederic Laloux in his book, "Reinventing Organizations."

Board Composition as of 1/28/20 (recruitment of additional members is ongoing)

Board Member	Office(s)	Role(s)	Expertise	
--------------	-----------	---------	-----------	--

Eric Oglesbee	President	Fundraising	 Former Director of Development for Good Shepherd Montessori School Former university professor Drexel Fund Fellow
Bruce Jones	Vice-President	Fundraising	Owner of multiple businessesInvestment portfolio manager
Eileen Mariani	Secretary; Treasurer	Montessori Fidelity	 Former public high school science teacher Former upper elementary guide at Good Shepherd Montessori School
Rob Nichols		Fundraising	 Engineer/Estimator for Rieth-Riley Construction Wide-ranging connections to construction industry in St. Joseph county
Hanna Osthimer- Studt		Financial Management	Senior Staff Accountant at Kruggel Lawton CPA
T.B.A.		Legal Expertise	
T.B.A.		Human Resources	

Launch Board: July 2020 - June 2021

- The Founding Board will expand to 9-11 members, appoint officers, and assume the duties and responsibilities of a Board of Trustees. The Board of Trustees will:
 - Safeguard the school's mission and competitive advantage. On an annual basis,
 Board members will assess the school's mission, strategic plan, and annual goals as
 well as the external environment to assure that the school is fulfilling its mission and
 meeting the needs of the community.
 - Secure sufficient resources to fulfill the school's mission. Board members are expected to work in partnership with school leadership to raise funds to support the school's mission.
 - Ensure strategic and effective resource allocation. As the fiduciary agents of the school, Board members will review and approve the school's budget and funding plan and will hold school leadership accountable for its effective and efficient management.
 - Hire, support, and assess the performance of the school's leadership. The Board will
 work as the governing partner to the school's management team and will ensure that
 these leaders have the training, support, and encouragement necessary to fulfill the
 school's mission and vision. In addition, the Board will assess annually the
 performance of the school's leadership and will hold them accountable to the job
 description and performance criteria upon which they mutually agree.
 - Serve as ambassadors for the organization. As the school's primary link to the community, the public, the media, and funders, Board members are expected to

- garner support from the community through their passionate commitment to and articulation of the school's mission.
- Set policies and procedures. As the school's governing body, the Board is expected to establish policies and procedures to support the mission.
- Monitor and ensure legal and regulatory compliance. The Board will review school policies and programs to ensure compliance with the law and with state regulations.
- Assess its own performance. As a component of holding the organization accountable to achieving its mission and efficiently allocating its resources, the Board is expected to evaluate its performance against its job description and performance criteria.

HUMAN RESOURCES PLAN

A. Staffing plan for the school, including an organizational chart and classification of employees (FTE, PTE, etc...);

SBMHS will be implementing a Teal organizational structure as described in Frederic Laloux's 2014 book, Reinventing Organizations. Used by for-profit corporations such as Zappos and non-profit organizations such as Wildflower Schools, Teal organizations are defined by well-defined distribution of autonomous roles and a corresponding advice-gathering process. When designed and implemented appropriately, organizations using this approach are able to streamline decision-making, increase employee buy in, and minimize administrative overhead.

For the purposes of creating an organizational chart, high-level roles have been identified in four domains: operations, academics, family development, and extracurriculars. Employees may take on more than one high-level role.

High-Level Role List By Domain

- · Operations Domain
 - Fundraising
 - Payroll & Employee Benefits
 - Facilities
 - Billing
 - Bill-Paying
 - Professional Development
- Academic Domain
 - Science
 - Language Arts
 - Social Sciences
 - Mathematics
- Family Development
 - · Parent Relations
 - Student Relations
- Extracurricular
 - Athletics
 - Performing Arts
 - Other

The following table indicates employee classification types.

Employee Classification	Description	Benefits
Full Time Employee (FTE) - Teach	5-day a week, full time employees whose primary responsibility is teaching	Health Tuition (50% of OOP)
Full Time Employee (FTE) - Support	5-day a week, full time employees who does not engage in teaching	Health Tuition (50% OOP)
Part Time Employee (PTE) - Teach	Part time employee (25 hours or less) whose primary responsibility is teaching	n.a.
Part Time Employee (PTE) - Support	Part time employee (25 hours or less) who does not engage in teaching	n.a.
Adjunct	Individual who is contracted to teach a specific course or manage a well-defined education experience	n.a.

The following table illustrates a possible initial distribution of roles in a scenario where there are three FTE-Teach and no Support employees.

High Level Roles	Year 0	Year 1 9th Only	Year 2 9th & 10th	Year 3 9th, 10th, &	Year 4 9th, 10th, 11th, & 12th	Year 5 9th, 10th, 11th, & 12th
OPERATIONS						
Fundraising	Α	Α				
Payroll & Employee Benefits	Α	Α				
Facilities	Α	В				
Billing	Α	Α				
Bill Paying	Α	Α				
Faculty Development	n.a.	В				
ACADEMIC						
Science	n.a.	В				
Language Arts	n.a.	С				
Social Sciences	n.a.	n.a.				
Mathematics	n.a.	Α				
FAMILY DEVELOPMENT						
Parent Relations	В	В				
Student Relations	В	С				
EXTRACURICULAR						
Athletics	n.a.	С				
Performing Arts	n.a.	С				
Other	n.a.	С				

Key: A = Eric Oglesbee (FTE - Teach) B = Eileen Mariani (FTE - Teach) C = Patrick Newsom (FTE - Teach) D = Year 2 Hire #1 (FTE - Teach) E = Year 2 Hire #2 (FTE - Teach) F = Year 3 Hire #1 (FTE - Support) G = Year 3 Hire #2 (FTE - Teach) H = Year 3 Hire #3 (FTE - Teach) I = Year 4 Hire #1 (FTE - Teach)

B. Description of the key qualifications of the first school leader

The ideal first school leader will need to have experience with teaching at the high school level, experience teaching in a Montessori environment, and training in adolescent development within the Montessori pedagogical framework. Given the novel approach to adolescent Montessori education being pioneered, ideal dispositions possessed by this person include:

- adaptability,
- · demonstrated internalization of Montessori philosophy across all planes of development,
- · even-keeled emotional makeup,
- · personal growth mindset,
- · demonstrated capacity for relational empathy, and
- capacity and willingness to engage in clear communicative practices.

C. Recruitment plans for administrators, teachers, and aides, including listing partner organizations for human capital development

Given that the curriculum is designed to leverage community resources and relationships, experience and connections within the South Bend community will play an important role in recruiting teachers. From a geographic perspective, SBMHS will engage in an "inside out" recruitment philosophy, meaning that searches will begin within the immediate South Bend community. Experience has shown that in many cases it is better to recruit an individual who has not taught within a "traditional" classroom environment. Experienced "traditional" teachers often have multiple habits that have to be "unlearned." The preferred approach is to identify an individual who resonates with Montessori philosophy and has content expertise and to pay for their Montessori training. For young teachers, we will recruit graduating students from the following institutions:

- · University of Notre Dame
- Indiana University South Bend
- · St. Mary's College
- · Bethel University

This commitment to training also allows teachers to be recruited from the general population of South Bend using traditional job search sites and word of mouth.

A secondary pipeline is the CMSTEP training program in Cincinnati, Ohio. Although most attendees are already employed, our goal is to be a destination for those who inquire about CMSTEP's program but who are not currently affiliated with a school.

A tertiary pipeline is the United Montessori Schools of Indiana (UMSI) job board.

D. Plans for providing key staff with feedback of their performance

The nature of a Montessori environment is to use community meetings by staff for affirmations and raising of community concerns. This structure serves as a mechanism for providing feedback on a day-to-day basis. To augment this, summative feedback will take place on a semi-annual basis. Individuals will complete brief evaluations for themselves and the rest of the teaching staff where performance in key areas is rated on a numerical scale and an opportunity is provided to give non-anonymous free response feedback. Staff members will receive an average of their peers' numerical responses to compare with their self-report. These materials will be debriefed in a staff meeting and archived with the Personnel Sub-Committee as evidence to be used within the retention and/or merit raise process.

In areas where staff members have sensitive roles relating to school operations (e.g., financial management), the form and frequency of feedback will be determined by the member of the board of directors who has appropriate expertise (e.g., the chair of the finance committee will be responsible for providing feedback on handling of financial matters).

INSTRUCTIONAL APPROACH

A. Proposed Student Goals and Outcomes

The fundamental goal of a SBMHS education is to prepare students for "what's next," whether that is attending a college/university, pursuing a trade, or something else (e.g., starting a business). This broad goal means that there are specific outcomes unique to each student. Sample possible unique outcomes include:

- if planning to attend college or university, a level of performance on the SAT/ACT that aligns with a target college or university the student desires to attend,
- if planning to enlist in the armed forces, a level of performance on the ASVAB that qualifies a student to join enlist in the military branch of his/her choice,
- if planning to start a business after graduation, developing a product prototype or successfully designing and executing a pilot of a potential money-making service,
- if planning to enter the trades, engagement in pre-apprenticeship training prior to graduation.

Regardless of post-graduation plans, there are universal targeted outcomes that apply to all students:

- completion of all requirements for an Indiana Core 40 diploma,
- · demonstrated capacity to manage personal finances, and
- creation of a 5-year post-graduation action plan for career and life development.

B. Explanation of and rationale for achievement standards for key academic areas

In addition to the mastery-based assessment methods used for coursework at SBMHS, all students will participate in PSAT (10th grade) and SAT (11th grade) testing so as to have a nationally norm-referenced achievement standard for English Language and Mathematics performance.

- At a full group level, the target is for the SBMHS median score to exceed national median.
- Additionally, a secondary achievement standard is for all students who intend to attend
 a college or university following graduation to score in the 75th-percentile or better on
 both the PSAT and SAT.

The rationale for these achievement standards is that although many colleges and universities are becoming "test optional," it is still the case that many initial admission decisions and financial aid offerings are connected to performance on standardized test scores. To support these achievement standards, the current plan is to offer optional PSAT/SAT preparation sessions during the 4:00 - 5:00 p.m. time slot as well as to have PSAT/SAT preparation be an option during open work times.

C. List of chosen curricula with brief description of their relationship to standards

SBMHS is currently developing a two-part curriculum within a Montessori framework: a "hybrid 9th" curriculum that is designed to be accessible to individuals who have not previously attended a Montessori school, and a 10th – 12th curricular cycle.

Using the high school curriculum provided by Oak Farm Montessori School for reference as well as materials provided by the recently closed Montessori High School at University Circle, the SBMHS curriculum will align with Indiana Core 40 standards as implemented within a Mastery-based assessment framework. An agreement with David Kahn, founder of Montessori High School at University Circle, has been entered into where he will provide feedback regarding fidelity to Montessori pedagogy as well as input regarding previous approaches to adolescent Montessori education. Marta Donahoe, founder of Clark Montessori High School, the first public Montessori high school in the United States, is providing consulting support regarding the developmental needs of adolescents as they relate to the academic curriculum.

The curriculum will be implemented within the LiFT platform (https://www.schoolhack.io/) with the intent of using the Mastery Transcript being developed by the Mastery Transcript Consortium (https://mastery.org/) as the primary reporting tool for colleges, universities, trade schools, and employers.

D. Mechanisms for periodically assessing progress towards goals, outcomes, and achievement standards

Regardless of projected post-secondary plans, all students will take the PSAT and SAT/ACT exams so as to provide quantitative, nationally norm-referenced data set as one measure of student outcomes. However, more important will be periodic pre- and post-graduation qualitative assessment tools in which artifacts of student work are linked to stated student and family goals. These qualitative assessments are in development and are anticipated to contain the following features:

- Pre-graduation
- · Beginning of year goal identification
- Mid-year reflection on goal progress (student and guide)
- End-of-year reflection on goal progress (student and guide)
- · Post-graduation
- One-year follow up
- Five-year follow up

E. Methods for addressing students whose baseline aptitude, performance, and prior school experience are dramatically below standard

Each school year will begin with assessments in the following fundamental academic areas to determine an individualized growth plan:

Mathematics

 Current plan is to use ALEKS (aleks.com) adaptive assessment for placement and remediation with instructor support

Writing

Current plan is to use start-of-year writing prompts to identify strengths/weaknesses

For cases where student level is exceptionally low, funds for adjunct and/or tutoring support exist in the budget to provide assistance.

- The multi-year curricular approach for grades 10 12 is designed to allow for students with significant deficits to have extended time to catch up to grade level with the support of peer learning and one-on-one instruction.
- The "hybrid 9th" grade is being designed to promote significant growth in the fundamental academic areas of mathematics and writing so as to support growth in other subject areas during the 10th 12th grade curricular cycle.

F. Description of teacher feedback and evaluation systems and how they are used to inform teachers of areas that need improvement

School Internal Feedback and Evaluation

The micro school design of SBMHS creates an environment where teachers are in a position to informally observe one another on a frequent basis and have access to learning paths for each student – it is not possible to "close the door" to outside observation. This has multiple implications:

- it becomes readily apparent whether or not a teacher is employing sound Montessori pedagogy, and
- content progress according to standards can be observed by fellow teachers.

Opportunities for feedback regarding both of these areas exist during weekly staff connections and monthly curricular strategy meetings. In the set of designated teacher/leader roles, one faculty member will be responsible for providing direct feedback regarding Montessori pedagogy, while a different faculty member will have responsibility for assessing content progress.

School External Feedback and Evaluation

As students progress through the curriculum, more time will be spent off campus utilizing community resources (e.g., dual credit programs at local colleges and universities, internships, private tutorials, etc...). These experiences will provide opportunities external feedback regarding the preparation level of students and feedback will be elicited at midway and final

points in the experience. This information will be used as a component of individual faculty member feedback and evaluation in corresponding subject areas (e.g., feedback received from a student taking a Chemistry I class at a local college could potentially provide insights for mathematics, science, and writing instructors at SBMHS).

G. School calendar and daily schedule and description of how they help you achieve your goals

The tentative school calendar for the 2020 – 2021 academic year is as follows (as of 1/21/20):

South Bend Montessori High School Annual Calendar 2020-2021

Week 0	August 17 August 20	First Day for Guides First day for Tuesday
Week 1	August 24-28	Cycle Week 0 Leadership and Community Building
Week 2	August 31-Sept.4	Cycle Week 1-1 Kick-Off – Connection Theme
Week 3	September 7 September 8-11	Labor Day - No School Cycle Week 2-1 Connection
Week 4	September 13-18	Cycle Week 3-1 Connection
Week 5	September 21-25	Cycle Week 4-1 Connection
Week 6	Sept. 28-Oct. 2	Cycle Week 5-1 Connection
Week 7	October 5-9 October 8 October 9	Cycle Week 6-1 Connection End of Cycle Project Connection Culminating Activity
Week 8	October 12 October 13-14 October 15-16	Columbus Day - No School Passion Project Fall Break - Teacher Records
Week 9	October 19-23	Cycle Week 1-2 Kick-Off - Meaning and Purpose Theme
Week 10	October 26-30 October 30	Cycle Week 2-2 Meaning and Purpose Guide/Parent/Student Conferences
Week 11	November 2-6	Cycle Week 3-2 Meaning and Purpose
Week 12	November 9-13	Cycle Week 4-2 Meaning and Purpose
Week 13	November 16-20	Cycle Week 5-2 Meaning and Purpose
Week 14	November 23-27	Cycle Week 6-2 Meaning and Purpose

	November 23 November 24 November 25-27	End of Cycle Project Meaning and Purpose Culminating Activity Thanksgiving Break – No School
Week 15	Nov. 30-Dec.4	Intersession Week 1
Week 16 Week 17	December 7-11 December 14-18 December 18 Dec. 21-Jan.3	Intersession Week 2 Intersession Week 3 Record Day Winter Break
Week 18	January 4-8	Monday January 4 – Classes Resume
Week 19	January 11-15	Cycle Week 1-3 Kick-Off - Creativity Theme Cycle Week 2-3 Creativity
Week 20	January 18-22	Cycle Week 3-3 Creativity
Week 21	January 18 January 25-29	Martin Luther King, Jr. Day – No School Cycle Week 4-3 Creativity
Week 22	February 1-5	Cycle Week 5-3 Creativity
Week 23	February 8-12 February 11 February 12	Cycle Week 6-3 Creativity End of Cycle Project Creativity Culminating Activity
Week 24	February 15-19 February 15	Cycle Week 1-4 Kick-Off – Transcendence President's Day – No School
Week 25	February 22-26	Cycle Week 2-4 Transcendence
Week 26	March 1-5	Cycle Week 3-4 Transcendence
Week 27	March 8-12	Cycle Week 4-4 Transcendence
Week 28	March 15-19	Cycle Week 5-4 Transcendence
Week 29	March 22-26 March 25 March 26	Cycle Week 6-5 Transcendence End of Cycle Project Transcendence Culminating Activity
Week 30	March 29-Apr.2 March 30-31 April 1 April 2	***(Monday) Teacher Record Days Guide/Parent/Student Conferences Good Friday - No School - Begins Spring Break
	April 5-9	Spring Break
Week 31	April 12-16	Cycle Week 1-5 Kick Off – Initiation Theme
Week 32	April 19-23	Cycle Week 2-5 Initiation
Week 33	April 26-30	Cycle Week 3-5 Initiation
Week 34	May 3-7	Cycle Week 4-5 Initiation

Week 35	May 10-14	Cycle Week 5-5 Initiation
Week 36	May 17-21 May 20 May 21	Cycle Week 6-5 Initiation End of Cycle Project Initiation Culminating Activity
Week 37	May 24-28	End of Year Community Event
Week 38	May 31-June 4 May 31 June 1	*** Memorial Day Last Student Day

For the 9th grade "hybrid", a typical weekly schedule is shown on the following page. The "Academic Blocks #1 - #15" are 2-hour sessions dedicated to work with an emphasis on the following academic subjects:

- Mathematics (Algebra Foundations, Algebra I, or Algebra II)
- English 9
- Spanish
- Biology I
- Physical Education
- Health and Wellness

In a given week, the number of blocks focused on a particular subject area may vary depending on the projects and activities associated with a course. For example, in Biology, all three Academic Blocks in a single day may be utilized when engaged in learning activities off campus at Prairie Winds Farm or other project sites.

	TYPICAL WEEKLY SCHEDULE							
8:00								
8:15								
8:30	Building Open (Student Flex Time)							
8:45								
9:00								
9:15								
9:30	Academic Block	Academic Block	Academic Block	Academic Block	Academic Block			
9:45	#1 &	#4 &	#7 &	#10 &	#13 &			
10:00	Community	Community	Community	Community	Community			
10:15	Meeting	Meeting	Meeting	Meeting	Meeting			
10:30								
10:45								
11:00 11:15	Advisory/Health	Advisory/Health	Advisory/Health	Advisory/Health	Advisory/Health			
11:30	Lunch	Lunch	Lunch	Lunch	Lunch			
11:45								
12:00 p.m.								
12:15								
12:30	A a a da sada Dia ala	A la la - Dla - la	A a a da sada Dia ala	A a a da sada Dia ala	A la la Dia - la			
12:45	Academic Block #2	Academic Block #5	Academic Block #8	Academic Block #11	Academic Block #14			
1:00								
1:15								
1:30								
1:45								
2:00								
2:30								
2:45	Academic Block	Academic Block	Academic Block	Academic Block	Academic Block			
3:00	#3	#6	#9	#12	#15			
3:15								
3:30								
3:45								
4:00								
4:15		المائين D. ناماني	a Open (Student Fl-	v Timo)				
4:30		Bullainé	g Open (Student Fle	x rime)				
4:45								
5:00			Building Closes					

The above structures (both the annual calendar and weekly schedule) support the individualized education approach of a Montessori environment by allowing routine reflection and readjustment of how students are spending their time. The small school size, coupled with this flexibility, create an optimal environment for student growth.

MARKET ANALYSIS

A. Description of the neighborhood/area that the school will serve (include size of the target market)

SBMHS will launch in the 46601 zip code in South Bend, Indiana. According to the 2017 American Community Survey:

- median Income is \$18,054,
- 51.4% of families below the poverty level have a child under the age of 18 in the home,
 and
- there are an estimated 336 children of high school age.

Although located in a particular neighborhood, SBMHS is expected to be a regional draw with many students commuting into downtown South Bend to attend. The school is located near public transit and commuter bike routes. In comparison to the 46601 zip code, the city of South Bend has:

- median income of \$37,441,
- 31.8% of families below the poverty level have a child under the age of 18 in the home, and
- there are an estimated 5,975 children of high school age (86.7% public school; 13.3% private school).

B. Description of the demographic characteristics (i.e., income, race/ethnicity, education levels and household structure) of the families in the neighborhood/area that the school intends to serve

Approximately 6.500 people live in the 46601 zip code with the following racial distribution:

- Black or African American: 48.3%
- White (non-Hispanic): 44.6%
- Hispanic: 5.5%
- Other Minority: 1.6%

More broadly, the city of South Bend has an estimated population of approximately 102,000 people with the following racial distribution:

- White (non-Hispanic): 53.9%
- Black or African American: 26.0%
- Hispanic or Latino: 14.4%
- Other Minority: 5.7%

C. Analysis of the current and expected educational options for children in your neighborhood/area - including traditional district, charter and private schools - with which your school will be competing for enrollment, noting key demographics and the academic performance of each school;

Within the private school domain, the primary competition for SBMHS is South Bend St. Joseph, Trinity, Marian, and La Lumiere high schools. All are participants in the Indiana School Choice scholarship program.

Within the charter school domain, Career Academy is the primary competitor with respect to families who are looking for a project-based, "hands on" educational framework. Additionally, Purdue Poly-Technic is scheduled to open a new charter high school in South Bend in Fall 2020.

Within the public school domain, the primary competition for SBMHS is the International Baccalaureate (IB) program hosted by John Adams high school. It is seen as a high quality "school within a school" that is the primary pathway for college preparation within the South Bend Community School system.

South Bend City High Schools	High School Enrollment	2018 Graduation Rate	Distance from SBMHS (miles)	Additional Notes
South Bend Cor	nmunity Schoo	I Corporation	(Public)	
John Adams	1,794	81.07%	1.7	Host to International Baccalaureate (IB) program – primary choice for college bound families who are not in private education.
Clay	1,143	72.66%	3.7	
Riley	1,249	71.09%	1.7	
Washington	906	65.52%	3.0	
St. Joseph (Private Catholic)	932* (all grades)	97.74%	1.1	
Trinity (Private)	244* (6 th – 12 th grade)	n.a.	1.7	
Career Academy (Public Charter)	266	86.89%	5.2	

Other Area Schools	High School Enrollment	2018 Graduation Rate	Distance from SBMHS (miles)	Additional Notes
Mishawaka High School (Public)	1,481	77.78%	5.0	
Penn (Public)	3,551	89.86%	7.5	
Marian (Private Catholic)	670* (all grades)	93.45%	3.4	
La Lumiere (Private Catholic)	183	n.a.	26.7	Boarding school and targeted destination for students from Stanley Clark, an elite K-8 school in South Bend.

D. Description of what makes your school unique in the current market

Building a curriculum around the use of community resources, multi-age classrooms, and employing a mastery-based approach to assessment and transcript generation are unique features of SBMHS. This approach allows for:

- students to co-create educational experiences with instructors that align closely with a student's post-graduation plans.
- long-term student/teacher relationships to be a powerful force in promoting academic growth in students who struggle in a subject area,
- opportunities for significant college classroom experience at the junior/senior levels by taking advantage of course offerings at IUSB, Bethel University, and Ivy Tech, and
- the freedom and capacity to engage in real, meaningful work that supports an individual's targeted career track.

This is in stark contrast to the highly scripted academic approach taken by the private school competitors and the IB program at John Adams.

E. Evidence of demonstrated interest in the school (i.e., onthe-ground interviews with families and key stakeholders)

In 2016 a survey of families at Good Shepherd Montessori School (GSMS), a potential feeder for SBMHS, 83% of the 66 respondents indicated that they were "very interested" (60%) or "somewhat interested" (23%) in sending their children to a GSMS-connected (i.e., Montessori) high school. At The Montessori Academy (TMA), another nearby Montessori school that goes through 8th grade, students have petitioned the board of directors on multiple occasions to open a high school.

On an annual basis, these two schools (GSMS & TMA) produce 25 – 30 8th grade graduates,

which with only a 50% retention rate (13 – 15 students) would still nearly fill an entire incoming SBMHS class (18 students).

Additionally, in interviews with former parents of students within the John Adams IB program, there is a growing concern that the heavy workload is not worth the IB diploma, as parents are increasingly finding that it is not a significant competitive distinction during the college admission and financial aid award process.

Lastly, direct evidence of interest in the school has come from response to print and television stories in the local media, which has led to interest in the school as expressed by the following metrics:

- between October 1, 2019 and January 21, 2020, the school's website (SouthBendMontessori.org) received 1,769 unique visitors,
 - the admissions webpage was accessed 441 times during this time period.
- the email list for donors and admissions inquiries as of January 21, 2020 contains more than 100 contacts, and
- as of January 21, 2020, the school's Facebook page has 199 followers.

MARKETING STRATEGY

A. Listing of the community organizations whose support will be necessary to ensure the success of the school and plans for communicating with them

Organization	Reason	Communication Plan
South Bend Heritage Foundation (SBH)	SBMHS is located in the primary operation sphere of SBH, which works to take historic properties and convert them into residential/commercial spaces that serve low-income families. They have direct access to a large low-income population adjacent to the school that would be prime candidates for the low-income seats.	The ED of SBH is the husband of one of SBMHS's co-founders and is aware of our project. Additionally, the board of SBH has already approved being a partner in acquiring a permanent facility for SBMHS.
South Bend Community School Corporation (SBCSC)	A challenge for micro schools is access to sports and extra- curricular activities. These can be provided in partnership with SBCSC.	We are already in dialog with the superintendent of SBCSC and the chief academic officer about participation in SBCSC sports/activities. An action plan has been outlined and is being pursued.
La Casa de Amistad	La Casa is a highly-regarded Hispanic community center in South Bend. They are an important advertising partner for accessing the Hispanic population.	The ED of La Casa is a member of the SBMHS Community Advisory Board.
Robinson Community Learning Center	The Robinson Center has extensive experience in managing education projects with a highly diverse constituency (both socioecoomic and racial). Tapping into this population for both recruitment and expertise will be important for situating SBMHS in the community.	The ED of the Robinson Center is targeted to be a member of the Community Advisory Board. She is already familiar with SBMHS as she was a representative of 1st Presbyterian church (SBMHS launch location) in the lease negotiations.
The Music Village	A downtown non-profit that supports community music education.	Conversations have already occurred with the ED about utilization of Music Village programming to support SBMHS curriculum.

South Bend Civic Theatre	A downtown civic theatre non- profit with extensive programing and opportunities for youth.	Conversations have already occurred with the ED about utilization of the Civic Theatre for programming to support SBMHS
		curriculum.

B. Description of student recruitment plans, with particular attention to how you expect to achieve the enrollment you need to attain for launch

Initial student recruitment is occurring place within the two Montessori feeder schools (GSMS and TMA) as well as the wider community. Activities that have taken place include:

- Mid-October visit to GSMS junior high classroom to share about SBMHS with students
- Mid-October parent night at SBMHS location to share about the school
- Late-October visit to TMA junior high classroom to share about SBMHS with students
- Mid-October parent night at TMA to share about the school
- · Late-October public event at South Bend Brew Werks
- December information meeting at the Brain Lair Bookstore
- January presentation at GSMS parent coffee
- Table at "First Friday" in downtown South Bend in January
- Multiple weeknight information nights in January
- Display table at MLK Day celebrations in downtown South Bend
- Late January open house
- Table at "First Friday" in downtown South Bend in February

Additionally, we have been strategically placing Google Ads and boosting Facebook posts that link television and print stories about SBMHS in the local media. In January, a former South Bend Community Schools teacher with expertise in connecting to low-income families joined the launch team as a Community Relations Specialist and is directly recruiting applicants for our low-income seats.

In the coming months we will be recruiting within local churches in South Bend as well as home schooling associations throughout the South Bend/Mishawaka community.

C. Timelines for enrollment and admissions

The admissions process opened in December and we are currently processing applications. When we reach capacity, a waitlist will be generated for each income category, as final acceptance will be contingent upon qualification for appropriate state financial aid.

Inquiry Targets

- 20 formal inquires by February 1 (actual = 14)
- · 40 formal inquiries by March 1

• 60 formal inquires by April 1

Application Targets

- 5 Completed applications by February 1 (actual = 4)
- 10 completed applications by March 1
- 15 completed applications by April 1
- 20 completed applications by May 1

Enrollment Target

• 18 confirmed students by May 1

ANALYSIS OF STATE-SPONSORED SCHOOL CHOICE PROGRAM(S)

A. Name of the entity that will be required to provide approval in order for the school to participate in the state-sponsored school choice program, if applicable

The Indiana State Board of Education (https://www.in.gov/sboe/) is responsible for approving "Freeway" accreditation applications which allow a school to participate in the Indiana Choice Scholarship and tax-credit scholarship programs in their first year of operation. For SBMHS, Choice Scholarships can be worth as much as \$6,198.1

B. Projected timeline and process for consideration of the school's approval, and

The Freeway accreditation process is outlined at https://www.doe.in.gov/accountability/school-accreditation:

When a school or corporation wishes to attain freeway accreditation, first it must submit a notice of intent to the Indiana Department of Education (Department), by July 31.

- Upon receiving this notice of intent by July 31, the Department identifies the school as "seeking accreditation" and begins an observational year of the school.
- During this observational year, the school submits required data collections to the Department, administers the statewide assessment to its students and prepares its petition to the Board.
- The petition includes the school's plans in compliance with the statutory requirements of Ind. Code § 20-26-15.

Upon completion of the observational year and submission of the school's petition, which the Department will work with each "seeking accreditation" school, the Department then submits a recommendation of accreditation to the Board. Upon Indiana State Board of Education approval, the superintendent of public instruction and the school's governing body enter into the freeway school contract for a five-year term. The Freeway Accreditation Notice of intent can be found posted at the link below, and must be received by July 31 to be considered "seeking accreditation status" for the following school year.

¹ Maximum 2019 - 2020 award for student coming from South Bend Community School Corporation (SBCSC).

A change in Indiana law now allows for new schools to qualify for a waiver which makes it possible for them to accept Indiana School Choice and tax-credit scholarships during the first year of operation. In December, 2019, SBMHS submitted initial information for review. A full application will be submitted mid-February 2020 for review at the March 2020 IDOE board meeting to qualify for 2020 - 2021 School Choice scholarships.

C. List a school (with its contact information) you have connected with in the state or city you intend to open your school that is using the choice program in the same manner you intend to use it and explain what you have learned

Alyssum Montessori School (916 S Calhoun St, Fort Wayne, IN 46802) opened in Ft. Wayne, Indiana in Fall 2018 with Freeway Accreditation in its first year. They have offered their guidance as SBMHS navigates the process.

In conversation with Alyssum, they reported that following completion of their application materials and review by IDOE staff that the actual board approval appeared to be a formality.

FACILITIES PLAN

A. Explanation of space needs over the next five years, how they will be met in your facility and a description of the facility's costs.

The facilities concept for SBMHS is to have a small physical footprint and use community resources instead of housing everything on site. The table below estimates the amount of square footage required as the school grows.

	Year 1	Year 2	Year 3	Year 4	Year 5
Sq. Footage	3,000	4,200	5,400	6,600	6,600

The facility in which SBMHS will be incubating (Education Wing of 1st Presbyterian Church) has approximately 12,000 sq. ft. of available space currently leasable at \$11/sq. ft. At present, this lease arrangement allows for up to 50% of the payment to be in the form of approved, permanent improvements to the space (e.g., flooring, painting, restroom updates, etc...). The lease includes all utilities, security, trash removal, and snow removal.

B. Assessment of capital costs for technology, furnishings, and equipment needs

Technology

- SBMHS will be a 1:1 environment to alleviate need for dedicated computer lab space. These costs have been built into the operating budget.
- Classrooms will require approximately \$3k \$5k in AV technology

Furnishings & Initial Renovation

• Classrooms and common spaces are primarily designed as co-working spaces; estimated cost per classroom between \$25k - \$40k.

Equipment

 SBMHS's science program – the main user of specialized equipment – is built around a biology and environmental science focus and does not require significant equipment expenditures (Physics and Chemistry are covered through local colleges and universities). Estimated costs for equipment are still in process.

C. Plans for financing a permanent home for your school, if applicable

Three options exist for securing financing for securing a permanent location:

IFF (https://iff.org/)

- Initial conversations have taken place to identify asset amounts that will be needed to secure financing.
- South Bend Heritage Foundation (SBH)
 - During the facilities search of the last 2 years, the board of SBH gave approval for the Executive Director of SBH to acquire a location for SBMHS to lease back – and eventually purchase from SBH.
- Centier Bank (https://www.centier.com/)
 - SBMHS currently has Centier Bank as its financial partner. The local president of Centier Bank (Steve Watts) reached out to the launch team of SBMHS to discuss ways Centier can meet our future needs as we grow.

During Year 3, the plan is to evaluate whether a long-term lease arrangement with 1st Presbyterian church or moving to a new space makes sense from a curricular and financial standpoint.

FUNDRAISING PLAN

Description of revenue model (i.e., tuition, tax credit/voucher revenue, fundraising/philanthropy)

The operational revenue model for SBMHS relies on a mixture of tuition, voucher, and philanthropy revenue. At maturity, the estimated distribution of these sources is:

- Tuition = 60%
- Vouchers = 25%
- Fundraising = 15%

For fundraising, the primary mechanism to raise these funds will be participation in Indiana's tax-credit scholarship program by aligning with a Scholarship Granting Organization (SGO). Donors who contribute to SBMHS's SGO partner will receive a 50% Indiana state tax credit which significantly reduces the difficulty of recruiting sufficient funds through fundraising.

Description of Leadership's track record in fundraising

Dr. Eric Oglesbee, SBMHS co-founder, has a short, but successful, history as a fundraiser. From January 2016 through July 2017, Dr. Oglesbee served as the Director of Development for Good Shepherd Montessori School in South Bend, Indiana. During that time, he developed a comprehensive development strategy for the school and in one year more than doubled restricted and unrestricted giving to the institution.

Additionally, Bruce Jones, current vice-president of the SBMHS board of directors, has significant fundraising experience. For many years, he was a key member of a development committee at South Bend St. Joseph High School that reached its multi-million dollar fundraising goals.

Expectations for start-up, capital, and operational fundraising needs in pre-launch year and first several years of operation

Pre-Launch Year

For the pre-launch year, it is anticipated that approximately \$100k will be needed to fully prepare the launch environment for Fall 2020. These funds are needed for minor renovations in the launch space as well as initial equipment purchases.

Years 1 - 5

Two financial models have been developed based on staffing contingencies (i.e., one "lean" and one "ideal" model). These models provide a range of projected fundraising needs during the first 5 years of operation:

- Initial cash on hand: \$50k \$100k
- Total operational fundraising over 5 year span: \$700k \$800k

• Total capital fundraising over 5 year span: \$200k - \$300k

Description of secured funding and expected funding sources

Pre-Launch Year

To date, \$25k in funding has been secured for preparing the launch environment. This does not include the value of donated equipment/furnishings (at time of writing conversations are in progress with a local supplier for the University of Notre Dame to donate classroom furniture). Additionally, should SBMHS affiliate with the Wildflower network of schools, a \$50,000 loan will be available to support initial equipment and furnishings.

At present the board is developing its full strategic plan to engage in significant fundraising over the next 6 months. To date, multiple high-capacity donors have been approached in initial conversations and a number of "grass roots", cocktail party fundraisers hosted at wealthy community members' homes are in the planning stages, with the first scheduled for late February.

Years 1 - 5

SBMHS is applying to the Drexel Fund for a total of \$105,600 in operational startup over the course of the first three years of school operation. Additionally, a pre-proposal has been submitted to the Walton Innovative Schools Program worth up to \$325,000. Other grant sources include four local foundations managed by Wells Fargo that SBMHS can apply to for operational support.

A major element of fundraising will be individual donor appeals and business sponsorships. The strong connections to high-capacity donors possessed by SBMHS board members will be key. A proposed requirement of board membership for SBMHS is that on an annual basis the board commits to recruiting a total of \$75k - \$100k in gifts per year, either through personal contribution or leveraging relationships.

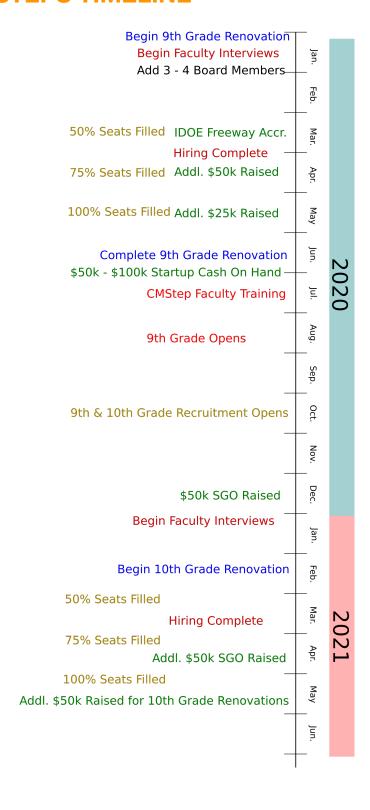
NETWORK GROWTH PLAN

The nature of SBMHS as a prototype for a new type of Montessori high school makes it difficult to outline a specific network growth plan at this time, although the school has intentional key design features which are meant to make replication possible:

- operational budget that does not rely on more than 15% of revenue from philanthropy,
- planned participation in Indiana School Choice program,
- technology solutions for curriculum delivery and customization (i.e., LiFT) that are instantly replicable,
- participation in the Mastery Transcript Consortium,
- creation of a 9th grade curriculum that is a year-long introduction to Montessori learning approaches so that a high school can exist without a Montessori feeder system, and
- · scaled launch of one grade at a time.

Given the likely affiliation of SBMHS with the Wildflower network of schools, the expectation is that the curricular and operational tools and procedure being developed at SBMHS will have an outlet for national replication within the Wildflower network. At a local level, Dr. Oglesbee has already received significant interest from stakeholders and major donors in a neighboring county (Elkhart) to launch a second high school approximately 20 miles from the initial location.

CRITICAL STEPS TIMELINE



South Bend Montessori High School (SBMHS)

Post-Covid19 Budget

Updated: 4/2/20

The following table is a summary of the launch and operational budget for SBMHS based on recruiting and fundraising challenges due to the Covid-19 pandemic.

FINANCIAL MODEL: SUMMA	RY																			
		2021		2022		2023		2024		2025		2026		2027		2028		2029		2030
STUDENTS		12		29		51		67		67		67		67		67	П	67		67
STAFF		3		4		6		7		8		8		8		8		8		
INCOME																				
Out of Pocket Tuition Payments	Ś	79,782	Ś	198,660	Ś	350,227	Ś	469,621	Ś	479,013	Ś	488,594	Ś	498,366	Ś	508,333	Ś	518,500	Ś	528,870
Out of Pocket Fees	Ś	900	Ś	2,219	Ś	3,980	Ś	5,333	Ś	5,439	Ś	5,548	Ś	5,659	Ś	5,772	Ś	5,888	Ś	6,00
School Choice Voucher	Ś	32,279	Ś	80,214	Ś	145,478	\$	192,653	Ś	196,506	Ś	200,437	Ś	204,445	Ś	208,534	Ś	212,705	Ś	216,95
SGO Fundraising	\$	39,120	Ś	92,956	Ś	166,667	\$	221,428	Ś	221,428	Ś	221,428	\$	221,428	Ś	221,428	Ś	221,428	Ś	221,42
General Fundraising	\$	69,300	Ś	42,240	\$	10,560	\$		\$		\$		\$		Ś		Ś	-	Ś	
Other Income	Ś	75,000	Ś		Ś	-	Ś		Ś		Ś		Ś		Ś		Ś	-	Ś	
TOTAL INCOME	\$	296,381	\$	416,288	\$	676,912	\$	889,035	\$	902,387	\$	916,006	\$	929,898	\$	944,067	\$	958,520	\$	973,262
EXPENSES																				
Salaries & Related Expenses	Ś	149,500	Ś	260,655	Ś	335,340	Ś	411,572	Ś	486,659	Ś	497,339	Ś	508,270	Ś	519,459	Ś	530,914	Ś	542,641
Employee Related Expenses	Ś	13,050	Ś	14,178	Ś	15,866	Ś	17,085	Ś	18,347	Ś	18,714	Ś	19,088	Ś	19,470	Ś	19,860	Ś	20,257
Direct Student Expenses	Ś	29,900	Ś	60,486	Ś	101,647	Ś	133,075	Ś	136,278	Ś	139,004	Ś	141,784	Ś	144,620	Ś	147,512	Ś	150,462
Administrative Expenses	Ś	29,100	Ś	30,549	Ś	32,304	Ś	33,799	Ś	34,475	Ś	35,165	Ś	35,868	Ś	36,586	Ś	37,317	Ś	38,064
Facility & Occupancy Expenses	Ś	34,500	Ś	48,423	Ś	62,756	Ś	77,508	Ś	78,679	Ś	79,867	Ś	81,073	Ś	82,298	Ś	83,541	Ś	84,803
Other Expenses	Ś	16,515	Ś	24,443	Ś	16,515	Ś	8,587	Ś	8,587										
Contingency	Ś	5,519	Ś	8,990	Ś	11,852	Ś		Ś	16,133	Ś		Ś	16,788	Ś	16,968	Ś	17,156	Ś	17,509
TOTAL EXPENSES	\$	278,084	\$	447,724	\$	584,208	\$	711,988	\$	795,015	\$	810,989	\$	827,315	\$	835,916	\$	844,887	\$	862,323
NET INCOME	\$	18,297	\$	(31,436)	\$	92,703	\$	177,047	\$	107,372	\$	105,018	\$	102,583	\$	108,151	\$	113,634	\$	110,939
CASH FLOW																				
TOTAL CASH FLOW	\$	18,297	\$	(31,436)	\$	92,703	\$	177,047	\$	107,372	\$	105,018	\$	102,583	\$	108,151	\$	113,634	\$	110,939
BEGINNING CASH	\$	25,000	ŝ	43,297	Ś	11,861	Ś	104,564	Ś	281,611	Ś	388.983	Ś	494,001	Ś	596,584	Ś	704,735	Ś	818,369
ENDING CASH	Ś	43,297	Ś	11,861	Ś	104,564	\$	281,611	Ś	388,983	Ś	494,001	Ś	596,584	Ś	704,735	Ś	818,369	Ś	929,308
	Ť		Ť	,	Ť		Ť		Ť	,	Ť	,	Ť	,	Ť		Ť	,	Ť	,
BUDGET FUNDRAISING % OF OPERATING INCOM		37%		32%		26%		25%		25%		24%		24%		23%		23%		23
BREAK EVEN FUNDRAISING % OPERATING INCO		30%		37%		12%		5%		13%		13%		13%		12%		11%		11
MINIMUM SGO DISBURSEMENTS NEEDED	\$	20,823	\$	92,956	\$	73,964	\$	44,381	\$	114,056	\$	116,410	\$	118,845	\$	113,277	\$	107,794	\$	110,489
SGO GIFTS REQUIRED (account for 7% admin fee	\$	22,280	\$	99,463	\$	79,141	\$	47,488	\$	122,040	\$	124,559	\$	127,164	\$	121,206	\$	115,340	\$	118,223
Expenses/Pupil	\$	23,173.65	\$	15,438.76	\$	11,455.06	\$	10,626.69	\$	11,865.89	\$	12,104.31	\$	12,347.99	\$	12,476.36	\$	12,610.25	\$	12,870.49
			-		_		_								_		_		_	

Notes: (1) "SGO Fundraising" is the estimated maximum amount of student tuition each year that is eligible for tax credit scholarships. This amount typically substantially exceeds the "break even" needs of the school. (2) The "SGO GIFTS REQUIRED" line provides an accurate measure of annual fundraising lift through the tax-credit scholarship program to maintain operations. Tax-Credit Scholarships are projected to be the primary fundraising mechanism for the school.

Table of Contents



Introduction

Overview of Program 2 Mission and Value Statements 2-3 Montessori Pedagogical Principles 3-4 Daily Schedule 4

Academic Program

Graduation Requirements 4-5
Mastery Learning 5
Experiential Learning 6
Multiple Intelligences 6
Three Period Lesson 6-7
2019-20 Academic Course Descriptions 7-11
Academic Policies and Assessments 12

Family -School Partnerships

Student Led Family Conferences 12 Communications Between Family and School 13 Programs for Parents 13

School Policies and Procedures

Absence and Tardy Policy 13
Attendance Requirements 13
Dress Guidelines 13-14
Lunch/Discipline/ Lockers/ Trips 14
Building and Grounds/ Alcohol, Tobacco and Illegal Substances/ Driving Safety Policy 15
Personal Electronics/ Cell Phones/ Computers and Policy 16-19

Overview of Program Structure

South Bend Montessori High School Curriculum is individualized by students in collaboration with teacher guides and provides opportunities to prepare for adulthood as well as citizenship. South Bend Montessori High School is an integration of the current research in adolescent brain development, best practices in education, and the Montessori philosophy. The goal of the program is to provide opportunities for students to gain self-confidence, self-knowledge, and practical life skills for adulthood while in a community that supports their creation of a personal vision for their present and future.

- o Learner-centered individualized environment
- o Teaching team of AMS credentialed teachers with additional adult resources
- Community partnerships
- o Student-parent-guide partnerships with students leading
- o Freshman year development of community, the Montessori method, and academic vigor
- o Future multi age groupings Sophomores and Juniors & Seniors
- Large blocks of work time
- Peer teaching
- o Multi-sensory space
- o Continuously refined to meet needs of young adults

Mission and Value Statements

We exist to meet the developmental needs of adolescents by educating high school students through the Montessori method in a mixed-income, community-oriented environment.

These defined values of the school are attached to "I" statements to help the students and staff identify and see how they are carrying out the values.

Montessori

I seek independence.

I nurture my spiritual self.

I embrace failure within learning.

Equity

I acknowledge differences.

I respond to individual needs.

I take action against injustice.

<u>Self</u>

I help when needed

I practice civic responsibility.

I engage in service opportunities.

Service

I learn for joy.
I do before asked.
I have the power of choice.

Community

I use my voice.
I disagree respectfully.
I pursue universal flourishing.

Montessori Pedagogical Principles

(author – Laurie Ewert-Krocker @ Hershey Montessori Secondary)

Montessori pedagogy has been around since 1907; it has been developed and refined through observation and practice for over a hundred years. There are Montessori schools worldwide and in every state in the United States. The principles consistent with Montessori practice at all levels have been proven and tested and include the following central tenets:

- · Knowledge is experienced and acquired holistically, so the child's exposure to and practice with concepts should be through an integrated approach to the disciplines. At the adolescent level, this requires project-based work. Integrated projects have the potential to be truly interdisciplinary in a meaningful way and can offer levels of choice and student-generated contributions; projects allow for a variety of learning approaches, including right-brain/left-brain integrations, experiential components, multiple modes of information gathering, and multiple modes of demonstration of knowledge.
- · Genuine learning takes place most readily in the context of purposeful work—work which has meaning for the learner in their developmental stage, their social situation, and their cognitive readiness. For the adolescent, purposeful work often takes the form of a contribution of expertise or action in the context of a collective endeavor or enterprise.
- · Learning takes place most effectively when students feel membership in a genuine and respectful community, where they experience ownership of place and opportunity for individual contribution to the community's endeavors. For the younger adolescent, this means a close and intimate community of immediate peers and caring adults; for the older adolescent, this means a gradual engagement with the broader community and the opportunity to learn from experts in the community and to make a contribution to the overall functioning of the wider society. A genuine Montessori learning community is also a community of mixed ages, (at least 3-year grade level groupings) which respects variations in human developmental timelines and provides the advantage of students teaching and learning from each other. Adults and students of all ages participate as lifelong learners in a genuine social learning community.
- · Learning takes place most effectively when the learner's own process is highly respected; Montessori pedagogy recognizes a fundamental three-period learning cycle, in which:
- $\cdot \text{ the first period is a clear, well-planned lesson that acts as a springboard for research, investigation, and study;}\\$

- the second period provides student/group/or adult-generated exploration, discovery, and activity (that gets outside the classroom and connects with nature, community resources such as the farm, the school community, or the local community whenever possible); the second period allows for adequate time for each learner's maximum engagement and absorption of conceptual knowledge;
- · and a third period elicits demonstration of understanding and mastery that takes different forms at different times (i.e. is not always a written test).
- · Maximum engagement and maximum self-paced learning require schedules that allow time for depth as well as breadth and benefits from maximum choice of meaningful work and contribution to any particular endeavor, project, or community work.
- · A Montessori approach recognizes that active, collaborative learning is not dominated by teacher centered delivery.
- · Individualized approaches and follow-up should be offered whenever possible to include a diverse set of learners and learning situations.
- · The opportunity for practical life skills—care of self, care of others, and care of the environment—are fundamental to human activity in a genuine community; therefore, students should have opportunities to be responsible for the organization and maintenance of their own environment, their own buildings, their own land, as well as developing a sense of stewardship for the land and resources of their local community.
- · Freedom to express one's perspective and ideas is fundamental to a healthy and democratic society; students should have multiple opportunities for personal self-expression in a variety of forms and circumstances.
- · Learning takes place most effectively when the environment for learning is specifically prepared with the developmental needs of the child in mind. The ideal prepared environment for adolescents is a land based community, experienced as a microcosm of society; the older adolescent should experience a greater connection to society.
 - · A Montessori approach assumes a balance of "the head and hands."

Daily Schedule

Freshman Daily Schedule for 2020-2021

(Monday – Friday)

•	• •
8:00-8:45	Open to Students
8:45-10:45	Block I
10:45-11:00	Community meeting
11:00-11:30	Health / Advisory
11:30-12:00	Lunch / Physical Expression
12:00-2:00	Block II
2:00-3:45	Block III
3:45-5:00	Open to Students

Academic Program

South Bend Montessori High School courses and seminars reflect the current Indiana High School Course

Titles and Descriptions Requirements, newest research on developmental needs of adolescents,

Montessori philosophy, current learning theories, and the predictions of skills needed for a productive life

in the 21st Century.

Mastery is required for credit in all course work and will be based on requirements determined through a gradeless multi-assessment approach through the software program Lift from School Hack in partnership

with Mastery Transcript Consortium (MTC).

Graduation Transcript Requirements:

English Language Arts (English I, II, III, IV): 8 credits

Mathematics (Algebra I, Algebra II & Geom., Trig, Pre-Calculus, Calculus, Statistics): 6 credits

Science (Bio, Enviro. Sci, Earth Sci, Anatomy & Physiology, Chemistry, Physics): 6 credits

Humanities (US History, US Government, Economics, World Geography, Geography/History of the

World, World History/Civilizations, and Psychology): 6 credits

Directed Electives (Spanish I, II, III, IV, Fine Arts, Career Tech Ed, Computer Science): 5 credits

Physical Education (On and Off campus, real world personal fitness activities offered quarterly): 2 credits

Multidisciplinary (Personal and Social Responsibility) 1 credit

Electives (Academic Independent Study, On-line coursework, STEAM, Introduction to Entrepreneurship,

Performing and Fine Arts Electives): 6 credits

Total Credits: 40 credits

Mastery Learning

Mastery learning is a form of personalized learning that gives students the time they need to master particular skills before progressing to the next level of work. The student takes on the responsibility of

understanding a concept versus merely accepting a low grade and never really learning the information.

The guide's job is to break down the learning into steps, to offer suggestions for internalizing the knowledge, and to give the time necessary to learn the information. According to research, the advantage of mastery learning is that it offers clear expectations, fosters mastery of a unit of study, is not

competitive, and encourages student responsibility.

5

Experiential Learning

As in all levels of Montessori education, there are opportunities for discovery and experiential learning in which participation is the goal. The areas in the program where experiential learning is the goal are electives and intersessions.

Multiple Intelligences

Recent discoveries about the nature of human intelligences have indicated that we have the ability to enhance and amplify our intelligences, and that intelligence is a multiple reality that occurs in different parts of the brain/mind system. Students will take a survey of where they are on the continuum of each of the nine intelligences as identified by Howard Gardner in his book, Frames of Mind. The nine intelligences are verbal/linguistic, logical/mathematical, visual/spatial, bodily/kinesthetic, musical/rhythmic, interpersonal, intrapersonal, natural and visionary. Students are asked to design their work to include each of the intelligences and reflect upon their growth in each area.

The Montessori Three Period Lesson

Montessori education employs the Three Period Lesson from Early Childhood through high school. What does this look like at the high school level?

The **First Period** sets the stage for learning by providing a framework; striking the imagination; and building upon existing knowledge. To fuel the learner's imagination and ability to discern, create, and find meaning, the new information is discussed within a context.

• Begins with a Guiding Question on the student study guide, such as:

What is the state of connectedness in our world today? How might we better understand human connectedness through the study of ecosystems? Where does biodiversity connect with your daily life?

The **Second Period** provides time to practice, examine, explore. This period is important because it is where the depth and breadth of learning occurs. This is the period that presents the greatest challenge to students, teachers, and parents because it is not the same in every situation. The overarching guideline for guides and parents during Period Two is to be able to step back to clearly observe and keep the bigger picture in mind.

- For guides, it involves the design of the work choices and is a time to observe carefully, determine what is needed, and guide, not rescue, students, which can be a fine line.
- For students, it is a time to learn from mistakes, to grapple with ideas, and ultimately to find success from owning their work and taking the responsibility for it, with no more assistance than is necessary. Work involves repetition, various approaches to the same topic, and multiple ways of experiencing and

learning so that ultimately mastery is achieved. The curriculum has been purposefully designed to include both Individual and group work.

• For parents, this means allowing their student time to struggle and take responsibility for their own learning. This may require establishing more (or less) structure at home.

Other Second Period aspects include:

- It requires maintaining open and respectful communication among students, guides, and parents.
- Timely completion of the work allows for timely feedback, which is crucial for optimal learning.
- It cultivates stretching one's abilities, staying organized, analyzing information, problem solving, persistence, taking initiative, written and oral communication, creativity, interaction and collaboration, adaptability, gaining confidence, leadership skills, and "aha's."
- In the first year of high school, it fulfills 50% of a student's overall assessment because being able to practice the challenges before being asked to accomplish mastery is vitally important to life-long learning.
- In the last three years of high school, it typically becomes less guided, preparing the students for the time that is near when they will be completely on their own. As oversight of the practice toward mastery diminishes, so does the weight, which becomes 25% of the overall assessment.
- The focus is on effort, timeliness, and participation so students have the freedom to struggle and learn from their mistakes before demonstrating a level of mastery.

The **Third Period** part of the lesson is where students aim to demonstrate mastery of the concepts or skills. Mastery can be defined as demonstrating proficiency of a math concept on a test or by successfully applying or synthesizing information with a mastery of 70% or better. The student's demonstration of mastery may take the form of performance or be evaluated with written assessments. If mastery is not attained, a student has the opportunity to revisit the material and retake the assessment.

Freshman Course Descriptions 2020-2021

Math

Algebra I (2 credits)

Algebra I integrates geometry, probability, and statistics with algebra. Students study variables, linear and polynomial expressions and linear systems. Four skills are emphasized: carrying out various algorithms; developing and using mathematical properties; applying mathematics in realistic situations; and representing or 8 picturing mathematical concepts. The use of technology is integrated into all areas and includes graphing linear and polynomial expressions and spreadsheet work. Students take quizzes for feedback and master comprehensive tests with at least 80%. Students are assessed in the areas of mathematics skills, problem solving skills and group projects. Algebra I uses the text Algebra by Big Ideas Learning. Students who have not had Algebra in middle school should take this class.

Algebra II (2 credits)

Algebra II emphasizes the use of linear and quadratic expressions, powers and roots, and functions. Students study logarithmic, trigonometric, and polynomial functions both for their abstract properties as well as a tool for modeling real-world situations. Students learn to use technology for graphing, problem solving, and record keeping. Students take quizzes for feedback and master comprehensive tests. Critical thinking is emphasized through application of concepts. Algebra II uses the text Algebra 2.

Geometry (2 credits)

Geometry focuses on the study of formal logic, deductive and inductive reasoning and serves as the introduction to abstract thinking. The study of geometry includes both Euclidean and non-Euclidean geometry. Mathematicians and important contributions to math will be studied along with geometric principles. Geometry uses the texts Geometry.

English

English I (2 credits per year)

Students engage in reading, writing, and the study of grammar, vocabulary and dialogue. They will explore a variety of literary traditions by querying history, identity, and expression throughout the world's literary offerings. By engaging with a variety of genres, styles, and themes, we aim to open students' eyes to the multitude of literary works that are available and to provoke them to question canonical works in a fresh way. Vocabulary is presented across the curriculum. We will be working with both: grammar for reading and grammar for writing; diagramming and constructing sentences on multiple levels. The main focus will be on analytical writing skills and learning and experimenting with the fundamentals of essay writing. There will be a focus on creative writing throughout the year as well. Honors credit students will have additional reading and writing expectations throughout the year.

Science

Biology I (2 credits)

Biology I is a course based on the following core topics: cellular structure and function, matter cycles and energy transfer; interdependence; inheritance and variation in traits; evolution. The activities are designed to support long-term retention of learning through the use of positive emotions while learning. All students are assessed both individually and as members of a group. The focus is on using great ideas to look for patterns in science and integrating this information into all disciplines and developing scientific inquiry techniques. Students will conduct a wide variety of laboratory experiments.

Business Entrepreneurship

Business Entrepreneurship (2 credits)

Introduction to Entrepreneurship, Global Economics, Personal Financial Responsibility, Principles of Business Management, Business Electives (1 credit per semester)

The course is designed to give students first-hand experience in starting and managing the South Bend Montessori Soap Shop. The majority of the year-long course will revolve around creating a business plan, keeping financial records, making quarterly journal entries, and experiencing strategic planning. Included in the course will be learning about current thoughts on what it takes to be successful in business and business ethics. Personal finance will also be addressed in the business course.

Multidisciplinary

Community Service (1 credit Freshman)

The curriculum is as follows: Freshmen learn more about the self, community, environment, and culture; This course is designed to have students learn through active participation in thoughtfully organized service experiences that meet a genuine community need. There are three parts to service learning: preparation, participation, and reflection/application. The young people participate in the planning and decision-making of the activities. It provides opportunities to use newly acquired academic skills and knowledge in real life situations in their 13 community and beyond. It extends student learning beyond the classroom and helps to foster the development of a sense of caring for others.

Second Language

Spanish I (2 credits)

Students will be introduced to the language and culture of Spanish speaking countries in order to develop their ability to communicate in Spanish, and gain an increased awareness of Spanish speaking people. The students will read, write, converse and listen to the Spanish language. Spanish will be spoken in class as much as possible. Grammar concepts are introduced in context and practiced in class. Daily review, conversation, and short story reading are included in class time as are group activities to develop vocabulary, dialogues, reading and listening comprehension, verb usage, and cultural information. Presentations will be assigned. Periodically a written and oral exam will be given to demonstrate understanding and mastery of the material.

Spanish II (2 credits)

Students will continue to develop their use and knowledge of the Spanish language. Students will read both independently and as a class group. They will write stories as a class and independently as well. Basic skills will be reinforced and more complex grammar concepts will be introduced in context. Students will continue their study and appreciation of Spanish culture. Spanish will be spoken in class as much as possible. Students are encouraged to use Spanish to communicate and participate actively in class. The four skills of reading, writing, speaking, and understanding will be further developed with group activities.

Spanish III (2 credits)

Students will further develop their ability to communicate effectively through speaking and improve their listening, reading, and writing skills. Spanish culture, history, and daily life will be further examined. Students are introduced to readings that develop vocabulary and are a basis for discussion. Advanced grammar concepts are looked at in context and are applied and used in speaking and writing assignments. Business Entrepreneurship (2 credits)

Directed Electives

Computer Science I (2 credits) This is the introduction to programming course in the computer science, programming experience is not required, although some students have had some previous exposure to programming. It emphasizes object oriented programming style and methodology. Concepts are presented in the context of working examples and exercises. Language syntax and computing paradigms are studied. Programming projects are used to reinforce key programming notions, including iteration, data types, functions, and objects. Projects may include graphics, string processing, and network applications.

Physical Education and Performing and Fine Arts Electives

These electives are experiential classes. Students choose these classes based on interest and are expected to participate fully. Mastery for these classes is based on class participation and completion of assigned projects. Students who do not complete the elective class at Mastery level will not be given credit for that class. Students need to take one credit in health fitness. (1/4 credit each quarter per course)

Physical Education

Health/ Physical Education YMCA / Kroc Center

Students vote on 4 different activities to do at the YMCA (2 things for the first half of the quarter and 2 different things for the last half of the quarter) Example: basketball, racquetball, circuit training room, swimming, pickle ball, spinning class, or fitness center

Yoga Practice

This is offered through a yoga instructor on the campus of SBMHS.

Bowling

Learn to bowl at Chippewa Bowl.

Self-Defense/Karate

Learn self-defense techniques with Master Hayden at ATA in Kendallville.

Cross Country Trail Running

Run trails at Potato Creek State Park and Rum Village Park

Ninja Warrior Workout

Master the Rum Village Aerial Park course and rock climbing walls at the Kroc Center.

Performing and Fine Arts

Painting & Sculpture - Fire Arts

Music - Music Village

Theatre - Civic Theater

Soap Shop Extension

Learn Soap making techniques and how to run a business.

Photography -

Students learn about using a DSLR camera and editing photos using Adobe Lightroom and Photoshop. Print out your work on the large format printer.

Ceramics - Fire Arts

Students learn the basics of wheel throwing and hand building. Students will learn how to throw a cylinder and bowl on the wheel. They will also learn the basics of slab building.

Stop Motion Animation

Video Production

Intersessions

Twice a year the regular curriculum stops for Intersession; when students participate in two immersion studies lasting one week. Each fall there is a mandatory Intercession based on grade level, and each spring, students choose from a list of offerings. These field studies can involve travel to other countries, other cities, or other locations in northeast Indiana; but most will likely include day trips or one over-night. Our students get to explore the world and acquire new skills during the Intercession field studies offered each year.

Fall Intersessions: Freshman Orientation to High School and Peer Community Building

Spring Intersessions: Student Choice

The possibilities are endless...areas can include Global Studies, Cultural Immersion, Sports and Athletics, Science and Engineering, Fine Arts, Government, and Outdoor Education

Academic Policies and Assessments

Progress Reports/ Narrative Report Cards/ Transcripts

Progress reports will be sent home in October to describe skills and performance in all academic subjects. The Narrative Grade Report Cards is a narrative assessment and a listing of enduring understandings covered each semester. The Official South Bend Montessori Transcript is sent home at the end of each school year with the credits achieved.

Homework Policy

South Bend Montessori High School supports students achieving individual goals for their current and future goals. This understanding means that students who do not need direction in assignments will be able to create their own schedule for work outside of school. "The National PTA recommendations fall in line with general guidelines suggested by researcher Harris Cooper: 10-20 minutes per night in the first grade, and an additional 10 minutes per grade level thereafter (e.g., 20 minutes for second grade, 120 minutes for twelfth). High school students may sometimes do more, depending on what classes they take (see Review of Educational Research, 2006)." Homework usually falls into one of three categories: practice, preparation, or extension. From Montessori's Three Period Lesson, these are all Second Period explorations that prepare students for Third Period illustrations of mastery. SBMHS work would be the following:

- · Mathematical concept/ skill practice
- · Preparation for seminars, presentations, assessments, and business projects
- · Extensions for independent work

Class Preparedness

If a student is not prepared for class by either not having the required materials or the assignment, the rest of the class is inconvenienced by the wait required to obtain those materials or by having to do more work, either in writing or by discussion, in order to make up for the lack of participation by that one community member. Late work is unacceptable; repeated offenders will be asked to create a personal management plan. Habitual offenders may be asked to spend time outside of regularly scheduled classes. If a student is part of a sports team or other extracurricular activities, he/she will be in jeopardy of losing this privilege. Parents will be notified of late homework if it becomes common.

Family-School Partnership

Student- Led Family Conferences

Conferences are an important part of a student's development into adulthood. Adolescents are given an opportunity to share what is important to them and know that the most important people in their lives, their parents and guides, care about what they have accomplished in the prior months at school. The process of allowing them to share in a more formal context of a conference lends importance and

credibility to their work. It also provides them an opportunity to learn to make an agenda and lead a meeting, which are important life skills. In October and February, the conferences provide an important opportunity for students, their advisor and parents to celebrate successes, assess status on current goals and share work the student values from classes. These conferences are not intended to address issues when the student is struggling. Such issues will be addressed as necessary through additional conferences called by the student, advisor, director or parents.

Communications Between Family and School

When a guide has concerns regarding a student's behavior or activities, the guide will discuss the issues with the student. If the guides feel it necessary for the parent to have specific information, they will ask the student to discuss it with the parents and call the guide within 24 hours to verify that the information was received. At that time, a meeting time can be set if necessary. The purpose of this procedure is to encourage the student to communicate with his/her parents.

Programs for Parents

Parenting adolescents in today's times can be very stressful and confusing. The school offers resources on parenting adolescents and Parent Education Nights throughout the school year.

School Policies and Procedures

Absence and Tardy Policy

SBMHS does not determine excused or unexcused absences. Students will track attendance, tardiest and complete a "soft skills" assessment to increase their personal awareness of their attendance. An absence is time away from highly interactive classroom activities of dialogue, group work, etc. and cannot be made up. Students and parents need to make the decision whether students should miss class or be tardy. Please contact Eileen Mariani when a student is going to be tardy or absent.

Late Arrival

Attendance will be documented at 8:45 a.m. in the first period class. Students arriving after 8:45 a.m. will be recorded as tardy. Tardies will be tracked by teachers and shared with students during Advisory. Students will track attendance, tardies and complete a "soft skills" assessment to increase their personal awareness. A parent must contact the school before 9:30 a.m. if the student knows he or she is going to be absent.

Leaving Early

Students that need to leave before the end of the school day (3:45 p.m.) will receive an absence from the classes missed, except for school sponsored activities. Students have the responsibility of signing themselves out after speaking with the HS guides. Students missing more than 4 hours of the school day will be considered absent.

Attendance Requirements

With special permission and arrangements, students may organize alternative activities to make up time.

Dress Guidelines

All students should dress in a respectful manner that demonstrates awareness of the comfort level of others, both those who are a part of this community and those who are visiting. This means that one's dress should not be sexually suggestive, violently suggestive, or suggestive of illegal substance use. All students must also keep up appropriate hygiene, which includes regular bathing, clean hair, and clean clothing. In keeping with Montessori philosophy, we aim for students to become increasingly aware of their clothing and its function. We hope that a student who wears something inappropriate will self-correct and refrain from wearing that item again. If clothing choices continue to be out of line with SBMHS's mission and values, a parent-student-teacher conference would need to be held. Students also need to be mindful of the weather and make clothing choices that allow them to be outside.

Lunch

Students are asked to bring their lunch to school. South Bend Montessori does not have a hot lunch program but will offer a cold lunch program. Personal lunches should be nutritious and well balanced. Lunches should be aligned with the school's whole foods and low sugar policy. A microwave is available for warm-up. Students are not allowed to leave campus during lunch except with parent and guide permission.

Discipline

Students are expected to conduct themselves with respect for their community and their environment. Respect does not allow for abusive language or destructive behavior either toward another or toward oneself. If a lack of respect occurs, the student will be asked to step aside and speak to an adult. Any concerns will be reported to the parents. SBMHS follows the Value Statements for Community: I use my voice, I disagree respectfully, and I pursue universal flourishing in each area in which we work. Students create guiding principles as a community and are expected to follow those throughout the year.

Failure to abide by established community guidelines will be met with a proportional response, ranging from temporary loss of privileges up to temporary or permanent removal from the SBMHS academic environment. In the case of expulsion (i.e., permanent removal from the environment), copies of a formal report outlining the rationale for expulsion will be submitted to the student, parent, and board of trustees within 3 business days of occurrence.

Lockers

As the ideal Montessori environment is clean and tidy, the students are expected to keep their lockers and the areas around them clean. Included in this responsibility is the removal of perishable food after three days. Lockers are the property of South Bend Montessori High School. Students may not put stickers on lockers. Damage to lockers is not expected; however, should damage to a locker occur, the student responsible for the damage will be liable. If the need arises, administration has the right to inspect the lockers at any time for health and safety reasons. The students are expected to respect the privacy of others, including their lockers. A student may not open another student's locker unless he or she is given permission by the user of that locker.

Trips

The students are expected to follow all school rules and any additional rules made by the teachers and chaperones on trips. If a student breaks a rule and the guide feels that he/she is a threat to the well-being of the group, the guide has the right to send the student home at the expense of the student's parents. The students are allowed to leave the group with permission from a guide or chaperone, but they must go in groups of at least three and it is their responsibility to return to a meeting point at the designated time. The students must respect the local people at all times.

Building and Grounds Policy

South Bend Montessori High School building is open between 8:00 a.m. and 5:00 p.m.. HS guides will notify students of days that the school is open for additional work time. Please do not enter school property before or after school hours. The school is not responsible for students on school grounds except during school hours.

Alcohol, Tobacco and Illegal Substances

South Bend Montessori High School recognizes that the use of tobacco products is a health, safety, and environmental hazard for students, employees, visitors, and school facilities. The Board believes that the use of tobacco products, alcohol or illegal substances on school grounds, in school buildings and facilities, on school property or at school-related or school-sponsored events is detrimental to the health and safety of students, staff and visitors.

South Bend Montessori High School recognizes that it has an obligation to promote positive role models at our school and to promote a healthy learning and working environment, free from unwanted smoke and tobacco use as well as alcohol and illegal substances for the students, employees, and visitors on the school campus.

No student, staff member or school visitor is permitted to use any tobacco products, alcohol or illegal substances at any time, including non-school hours (24/7) in the following locations or under these circumstances:

- · In any building, facility, or vehicle owned, leased, rented or chartered by South Bend Montessori High School;
- · On any school grounds and property including athletic fields and parking lots –; or
- · At any school-sponsored or school-related event on-campus or off-campus.
- · Further, no student shall be permitted to possess a tobacco product, alcohol or illegal substance while in any school building; while on school grounds or property; or at any school-sponsored or school-related event, or at any other time that students are under the authority of school personnel.

Driving Safety

Students are expected to drive carefully and respectfully at all times, and to exercise special caution where safety is an issue. In particular, drivers should give way to students who are using the walkway around the building. Students who drive recklessly will lose their driving privileges. Students must not use cell phones or text while their vehicles are in motion, especially in the school parking lots or driveways. All students should register their cars with SBMHS. Reminder: For the safety of everyone, please do not use a cell phone while your vehicle is in motion in the parking lots or on the South Bend Montessori School

driveways. Once students are on campus, they will leave vehicles parked until the end of the school day, unless given specific permission for field studies or college coursework.

Personal Electronics Policy/ Cell Phones

Personal electronic devices may only be used at school for meaningful learning purposes, with prior discussion and approval of the guides, and with a guide present in the room. Outside of approved classroom use, devices must remain stored in the locker for the school day. HS students may use cell phones before and after school hours. Electronics will only be allowed on field trips or outings where agreements and ground rules have been predetermined by the whole SBMHS community. Violation of those ground rules may result in the loss of electronics for the remainder of the trip or outing. If at any time a student is found to use electronics in a manner that is disrespectful or disruptive to the learning environment, the permanent loss of electronics privileges may occur.

Computer Usage and Treatment and Technology Policy

Students are provided a computer for their use. Students will be expected to adhere to the Guiding Principles of computer usage. Listed below are the provisions of your agreement with South Bend Montessori High School regarding computer network and Internet use. If any user violates this Policy, the student's access will be denied, if not already provided, or withdrawn, and he or she may be subject to additional disciplinary action.

PERSONAL RESPONSIBILITY

By signing this Policy, you are agreeing not only to follow the rules in this Policy, but are agreeing to report any misuse of the network to the person designated by South Bend Montessori High School for such reporting. Misuse means any violations of this Policy or any other use that is not included in the Policy but has the effect of harming another or his or her property.

PERMITTED USE

A student who submits to South Bend Montessori High School, as directed, a properly signed Policy and follows the Policy to which she or he has agreed will have computer network and Internet access for the duration of his or her stay at South Bend Montessori High School. Students and their parents will be asked to sign a new Policy at the beginning of each year for the duration of their time at South Bend Montessori High School before they are given computer network and Internet access.

ACCEPTABLE USES

A. Educational Purposes and Communicating with Families. South Bend Montessori School is providing access to its computer networks and the Internet primarily for educational purposes. If you have any doubt about whether a contemplated activity is acceptable, you may consult with the person(s) designated by Oak Farm Montessori School to help you decide if a use is appropriate.

- B. Unacceptable Uses of Network. Among the uses that are considered unacceptable and which constitute a violation of this Policy are the following:
 - 1. Uses that violate the law or encourage others to violate. You may not:
 - a. Transmit offensive or harassing messages;
 - b. Offer for sale or use any substance the possession of which is prohibited by South Bend Montessori High School;
 - c. View, transmit, or download pornographic materials or materials that encourage others to violate the law;
 - d. Intrude into the networks or computers of others; and
 - e. Download or transmit confidential, trade secret information, or copyrighted materials. Even if materials on the networks are not marked with the copyright symbol, you should assume that all materials are protected unless there is explicit permission on the materials to use them.
 - 2. Uses that cause harm to others or damage to their property; including:
 - a. Engage in defamation (harming another's reputation by lies);
 - b. Employ another's password or some other user identifier that misleads message recipients into believing that someone other than you is communicating or otherwise using his/her access to the network or the Internet;
 - c. Upload a worm, virus, "Trojan horse," "time bomb," or other harmful form of programming or vandalism;
 - d. Participate in "hacking" activities or any form of unauthorized access to other computers, networks, or information systems.
 - 3. Uses that jeopardize the security of student access and of the computer network or other networks on the Internet. For example, you may not:
 - a. Disclose or share your password with others;
 - b. Impersonate another user.
 - 4. Uses that are commercial transactions. Students and other users may not sell or buy anything over the Internet
- C. Network Etiquette. All users must abide by rules of network etiquette, which include the following:
 - 1. Be polite. Use appropriate language. No swearing, vulgarities, or suggestive, obscene, belligerent, or threatening language.
 - 2. Avoid language and uses that may be offensive to other users. Don't use access to make, distribute, or redistribute jokes, stories, or other material that is based upon slurs or stereotypes relating to race, gender, ethnicity, nationality, religion, or sexual orientation.

- 3. If applicable, don't assume that a sender of e-mail is giving his or her permission for you to forward or redistribute the message to third parties or to give his/her e-mail address to third parties. This should only be done with permission.
- 4. If applicable, be considerate when sending attachments with e-mail (where this is permitted). Be sure that the file is not too large to be accommodated by the recipient's system and is in a format that the recipient can open.

INTERNET SAFETY

A. General Warning; Individual Responsibility of Parents and Users. All users and their parents/guardians are advised that access to the electronic network may include the potential for access to materials inappropriate for school-aged pupils. Every user must take responsibility for his or her use of the computer network and Internet and stay away from these sites. Parents of minors are the best guide to materials to shun. If a student finds that other users are visiting offensive or harmful sites, he or she should report such use to the person designated by the School.

- B. Personal Safety. Be safe. In using the computer network and Internet, you may not:
 - 1. Reveal personal information such as your home address or telephone number.
 - 2. Use your real name or any other information that might allow a person to locate you without first obtaining the permission of a supervising teacher.
 - 3. Arrange a face-to-face meeting with someone you "meet" on the computer network or Internet without your parent's permission (if you are less than 18). However, regardless of your age, you should never agree to meet a person you have only communicated with on the Internet in a secluded place or in a private setting.
- C. "Hacking" and Other Illegal Activities. It is a violation of the Policy to use South Bend Montessori High School's computer network or the Internet to gain unauthorized access to other computers or computer systems, or to attempt to gain such unauthorized access. Any use that violates state or Federal law relating to copyright, trade secrets, the distribution of obscene or pornographic materials, or which violates any other applicable law or municipal ordinance, is strictly prohibited.
- D. Confidentiality of Student Information. Personally identifiable information concerning students may not be disclosed or used in any way on the Internet without the permission of a parent or guardian or, if the student is 18 or over, the permission of the student himself/herself. Users should never give out private or confidential information about themselves or others on the Internet, particularly credit card numbers and Social Security numbers. A supervising teacher or administrator may authorize the release of directory information for internal administrative purposes or approved educational projects and activities.
- E. Active Restriction Measures. South Bend Montessori High School utilizes filtering software or other techniques to prevent students from accessing visual depictions 22 that are (1) obscene, (2) child pornography, or (3) harmful to minors. South Bend Montessori High School will also monitor the online

activities, through direct observation and/or technological means, to ensure that students are not accessing such depictions or any other material that is inappropriate for minors.

PRIVACY

Network and Internet access is provided as a tool for your education. South Bend Montessori School reserves the right to monitor, inspect, copy, review, and store at any time without prior notice any and all usage of the computer network and Internet access and any and all information transmitted or received in connection with such usage. All such information files shall be and remain the property of South Bend Montessori High School and no user shall have any expectation of privacy regarding such materials.

FAILURE TO FOLLOW POLICY

The user's use of the computer network and Internet is a privilege, not a right. A user who violates this Policy shall, at a minimum, have his or her access to the computer network and Internet terminated, which South Bend Montessori High School may refuse to reinstate for the remainder of the student's enrollment at South Bend Montessori High School. A user violates this Policy:

- 1. By his or her own action or by failing to report any violations by other users that come to the attention of the user.
- 2. If he or she permits another to use his or her account or password to access the computer network and Internet, including any user whose access has been denied or terminated.

South Bend Montessori High School may also take other disciplinary action in such circumstances.



FACULTY HANDBOOK

Revised: 10/24/19

INTRODUCTION

The founding Board of Directors of South Bend Montessori High School ("SBMHS" or "the School") developed this handbook to inform employees about employment policies, the benefits provided to employees, and the conduct expected from employees.

This handbook should not be construed as creating any kind of employment contract for any particular period. SBMHS employees are employed on an "at will" basis.

OVERVIEW

About the School

Founded in 2020 by Eileen Mariani and Dr. Eric Oglesbee, South Bend Montessori High School (SBMHS) exists to foster peace in the city of South Bend, Indiana and the wider world through a Montessori high school education grounded within a diverse, urban setting where the surrounding community is an integral classroom environment.

SBMHS was established within the cultural tradition of Good Shepherd Montessori School and seeks to carry on the mission of being a diverse, cooperative learning community that uses the Montessori Method to nurture the character and uniqueness of the [adolescent] and to inspire wonder and a joy of learning.

What Employees Can Expect from the School

A core ethos of SBMHS is the pursuit of *universal flourishing*, and as such, the organizational structure and policies of SBMHS are intended to serve faculty, staff, students, and students' families. Employees of SBMHS can expect that the board of directors and fellow faculty/staff members will:

- fully embrace Teal organizational practices, which include faithful use of the Advice Process and well-defined Roles & Responsibilities,
- provide transparent, timely feedback both critical and laudatory when warranted, and
- recognize that all members of the community are people who are in process and not yet their full selves.

These same standards are also what the School expects of each employee.

GENERAL EMPLOYMENT

Equal Employment Opportunity

SBMHS does not and will not discriminate in employment opportunities or practices on the basis of race, color, national origin, ethnic origin, gender, sexual orientation, and religion.

Any employee with questions, concerns, or comments about any type of discrimination in the workplace or the potential need for a reasonable accommodation due to disability or religion should bring such issues to the attention of the CEO. In a case where the CEO is a party to the complaint, concerns should be brought to the chair of the board of directors. Employees can raise concerns and make reports without fear of reprisal.

Anyone found to be engaging in any type of unlawful discrimination will be subject to disciplinary action, up to and including termination of employment.

At-Will Employment

In absence of a signed employment contract, employment with the School is "at will." Non-contractual employment may be terminated by the CEO with or without cause, and with or without notice, at any time, at the option of either the School or the employee, except as otherwise provided by law.

Advertisement of Employment Opportunities

In order to attract the best faculty and staff, SBMHS strives to post all open positions on the School's website and utilize other local and national services. Questions regarding an opening or potential employment should be directed to the CEO.

Personnel Administration

Human Resources (HR) tasks are negotiated roles among the staff of SBMHS. See the most recent Master Role Spreedsheet to identify who is overseeing specific HR roles (e.g. who is handling personnel records, insurance, benefits, and related personnel matters). If a role assignment is not clear, contact the CEO.

Employees' Personnel Files

Employees shall be responsible for keeping their own personnel files updated since the contents affect pay, deductions, benefits and other matters. If an employee has a change in any of the following items, he/she should notify the staff member in charge of Personnel Files as soon as possible:

- Legal name
- Home address or mailing address
- Home telephone number

- Person to call in case of emergency
- · Number of dependents
- Marital status
- Change of beneficiary
- Driving record or status of driver's license, if the employee operates any School vehicles
- Military or draft status
- Exemptions on the W-4 tax form
- Any other matters that would affect an employee's status, to include the completion of
 educational or training courses, outside civic activities, and areas of interest and skills
 that may not be part of one's current position.

Employment Classifications

Within a Teal organization model, all employees are eligible to take on leadership roles in specific domains. If an employee has an direct teaching responsibility that is tied to completion of formal coursework, their designation is "faculty." If an employee does not have formal teaching duties, their designation is "operations support." Policies described in this Handbook and communicated by the School apply to all faculty and operations support personnel unless specifically noted otherwise.

Temporary Employees

From time to time, the School may hire faculty and/or operations support for specific periods of time or for the completion of a specific project. An individual hired under these conditions will be considered a temporary employee. The job assignment, work schedule, and duration of the position will be determined on an individual basis.

Outside Employment

The School expects that full-time employees consider the School their primary employment. Any outside employment must not interfere with the employee's primary job and be disclosed to the CEO.

Background Screening

All employees will be subjected to criminal background checks that may include fingerprinting.

Driver's License & Driving Record

Employees whose work requires operation of a motor vehicle must present and maintain a valid driver's license and a driving record acceptable to the School's insurer. These employees will be asked to submit a copy of their driving record to the School from time to time. Any changes in an employee's driving record must be reported to the School immediately.

Inspection Policy

The School is not responsible for the theft or loss of one's personal property. Therefore employees should take care to ensure that all personal and School property is properly stored at all times. In order to protect the safety and property of employees, students, and parents, the School reserves the right to inspect all areas on campus and at School-related events, including employees' personal property, lockers, tool boxes, desks, purses, briefcases, packages, computers, electronic devices, cabinets, and vehicles. Inspection of electronic devices includes inspection of the contents, such as emails, texts, photos, images, documents, and any other information contained therein. Failure to cooperate with such inspections will constitute a violation of this policy.

BUSINESS HOURS, GENERAL PRACTICES, & EXPECTATIONS

The School's academic day runs from 8:45 a.m. – 4:00 p.m., Monday – Friday. The school building is open for student use from 8:00 a.m. – 5:30 p.m., Monday – Friday. Employees' particular hours of work and the scheduling of lunch periods will be determined in consultation with the CEO.

Employees may be assigned other duties and required to attend meetings that extend beyond these business hours.

Work Schedule and Attendance

To maintain a productive work and educational environment, SBMHS expects employees to be reliable and to be punctual in reporting for scheduled work.

Employees are expected to be at work at the beginning of the day and are expected to remain at work until the end of the day. During hours when students are assigned to an employee, the employee will be responsible for these students.

The School is aware that emergencies, illnesses, bereavement, or pressing personal business cannot always be scheduled outside working hours. Nonetheless, employees should strive to schedule personal appointments after the School day. The CEO must be notified of any planned absences.

If an employee is unable to report to work or will arrive late, he or she must personally contact the CEO or designee with as much advanced notice as possible so that the School can arrange for someone else to cover the position.

Failing to notify the School of any absence may be considered a voluntary resignation.

Professional Development and Reimbursement

Professional development is a high priority. Coursework, conferences, or other forms of development that are pre- approved by the CEO may be reimbursed. Employees who wish to pursue professional development should discuss these opportunities with the CEO.

Curriculum Oversight

The Curriculum Development & Delivery Coordinator (CDDC) is the director of curriculum. The CDDC will construct the curriculum so that it is consistent with the School's mission and the principles of the Montessori Method. Teachers must implement their courses under the CDDC's direction. Teachers must inform the CDDC of any significant changes to a course or subject, whether it is being taught for the first time or has been taught for years. The CDDC will inform the Board of any significant changes to a course or subject. The CDDC will propose to the Board in advance any substantive changes to the curriculum as a whole.

No Harassment Policy

SBMHS does not tolerate the harassment of applicants, employees, students, parents or vendors. Any form of harassment relating to an individual's race, color, religion, national origin, age, disability, pregnancy, genetic information, sexual orientation, marital status, citizenship status, service member status, or any category protected by law, or any other category protected by federal, state, or local law is a violation of this policy and will be treated as a disciplinary matter.

Violation of this policy will result in disciplinary action, up to and including immediate termination of employment.

At a minimum, the term "harassment" as used in this policy includes:

- Offensive remarks, comments, jokes, slurs, or verbal conduct pertaining to an
 individual's race, color, religion, genetic information, national origin, sex (including same
 sex), pregnancy, age, disability, citizenship status, service member status, sexual
 orientation, or any other category protected by federal, state, or local law;
- Offensive pictures, drawings, photographs, figurines, or other graphic images, conduct, or communications, including e-mail, faxes, and copies pertaining to an individual's race, color, religion, genetic information, national origin, sex (including same sex), pregnancy, age, disability, citizenship status, service member status, sexual orientation, or any other category protected by federal, state, or local law;
- Offensive sexual remarks, sexual advances, or requests for sexual favors regardless of the gender of the individuals involved; an
- Offensive physical conduct, including touching and gestures, regardless of the gender of the individuals involved.

SBMHS absolutely prohibits retaliation, which includes: threatening an individual or taking any adverse action against an individual for (1) reporting a possible violation of this policy, or (2) participating in an investigation conducted under this policy.

Non-employees are also covered by this policy. SBMHS prohibits harassment, discrimination, or retaliation of our employees in connection with their work by non-employees. Immediately report any harassing or discriminating behavior by non-employees. Any employee who experiences or observes harassment, discrimination, or retaliation should report it using the guidelines listed below.

If you have any concern that our No Harassment policy may have been violated by anyone, you must immediately report the matter. Due to the very serious nature of harassment, discrimination and retaliation, you must report your concerns to one of the following individuals: CEO or Board Chair. You should report any actions that you believe may violate our policy no matter how slight the actions may seem.

The School will investigate the report and then take prompt, appropriate remedial action. The School will protect the confidentiality of employees reporting suspected violations of this or any other School policy to the extent possible consistent with our investigation. However, consistent with the need to conduct an adequate investigation, complete confidentiality cannot be guaranteed.

You will not be penalized or retaliated against for truthfully reporting improper conduct, harassment, discrimination, retaliation, or other actions that you believe may violate this policy.

An individual who retaliates against someone who has reported a concern in good faith is subject to disciplinary action up to and including termination of employment. The School is serious about enforcing our policy against harassment. We cannot resolve a potential policy violation unless we know about it. You are responsible for reporting possible policy violations to us so that we can take appropriate actions to address your concerns.

Drug and Alcohol Policy

Employees are prohibited from reporting to work or any official school function under the influence of alcohol or non-prescription drugs. Outside of official school hours or functions, employees are expected to follow all local laws and regulations as they pertain to the legal consumption of state-altering substances. Engaging in legal conduct while under the influence of said substances may still result in discipline or dismissal if the board of directors determines that the conduct has been damaging to the School's reputation.

Guidelines for Utilizing Volunteers or Community Partners

- Volunteers and guests may not have unsupervised access to students unless a background check is on record.
- Volunteer activities should be structured in such a manner as to avoid unsupervised access to students. For example, assisting students in hallways and rooms with doors open, or with an employee present.
- Any volunteer with unsupervised access to students will have a background check run at the school's expense. This may include (but is not limited to) coaches, chaperones, shuttle drivers, and community education partners.
- All volunteers will be searched against the national sex offender registry by the school's volunteer coordinator.
- One-off and new volunteers who have not submitted a release/waiver should be closely supervised by an employee at all times.

Security of Facilities and Physical Assets

Maintaining the security of SBMHS's buildings and property is every employee's responsibility. Employees must develop habits that ensure security as a matter of course. For example:

- Always keep cash properly secured. An employee who is aware that cash is insecurely stored should immediately inform the person responsible.
- Employees should know the location of all alarms and fire extinguishers and be familiar with the proper procedure for using them.
- Employees leaving School's premises should ensure that windows are shut and doors are locked. The last employee on the premises should make sure all entrances are properly locked and secured.
- Employees who are given keys shall be responsible for the cost of lost keys and/or rekeying.

Conflicts of Interest

A "conflict of interest" occurs when an individual's private interest interferes with, or appears to interfere with, the interests of the School.

For example, a conflict of interest would arise if an employee, or a member of his or her family, receives improper personal benefits as a result of his or her position with the School. Any transaction or relationship that could reasonably be expected to give rise to a conflict of interest should be discussed with the Principal. Such situations may include:

- influencing or attempting to influence anyone who is involved in making or administering a contract or arrangement with the School;
- soliciting or receiving any gift, reward or promise for recommending, influencing or attempting to influence the award of a contract or arrangement with the School;

- drafting, negotiating, evaluating, administering, accepting or approving any contract or subcontract or procurement or arrangement of any type on behalf of the School if he/she has, directly or indirectly, any financial interest in such a contract or subcontract or arrangement;
- non-School employment which adversely affects the employee's availability or effectiveness in fulfilling job responsibilities;
- tutoring students for compensation;
- any type of private business conducted during School time or on School property;
- the receipt of excessive entertainment or gifts of more than nominal value from any person, entity, or organization with whom or with which the School has current or prospective dealings;
- being in the position of supervising, reviewing, or having any influence on the job evaluation, pay, or benefits of any immediate family member employed by or otherwise associated with the School; and
- selling anything to the School or buying anything from the School on terms and conditions that are not pre-approved by the CEO.

This is not an exhaustive list of all possible situations which would constitute conflicts of interest. Further, any relationship or action which creates an expectation of benefit or profit beyond an employee's normal employment relationship with the School can impair an employee's ability to exercise good judgment on behalf of the School, and therefore creates an actual or potential conflict of interest. It is the School's policy that all School employees must scrupulously avoid all such situations.

Any such transaction or relationship that would present an actual or potential conflict of interest for an employee also would likely present a conflict if it is related to a member of such person's family, including without limitation, spouse, parent, child or spouse of a child, brother, sister, or spouse of a brother or sister.

In connection with any actual or potential conflict of interest, an employee must disclose the existence of the conflict in writing and all facts material to the conflict to the CEO.

Employee Absences (Excused & Personal Days)

The well-being of the School depends upon the consistent attendance of employees, both teachers and staff. The School's quality and efficiency are the result of dynamic, knowledgeable teachers and a lean, professional staff. In such a small organization, an absence is keenly felt and requires other employees to work harder. Nonetheless, there are obviously different circumstances and occasions that warrant employee absences. In order to balance planned absences with the needs of the School, employees should follow the criteria below.

The working year includes all the days on the School calendar, the staff days and the faculty training in late summer prior to the opening day, the required days the week following the end of the School year, and the designated days for staff during the summer break.

The following are normally **excused absences** during either the School year or any required work days mentioned above.

Emergency/Health/Unplanned

- Sickness or injury of the employee
- Sickness or injury of an employee's child
- Bereavement

Family

- Unique personal or life-changing events (e.g., father at birth of his child, graduation of a child from college)
- One-time personal events, usually not an entire day (e.g., closing on a house)
- Unique events of close family member (e.g., sister's wedding)

Employees are allocated three personal days per year, provided they are:

- not used to extend a holiday;
- not used during a major event of the School (e.g., Standardized Testing, Curriculum Day, Graduation);
- not disruptive to the flow of learning for students or become a burden to fellow faculty or staff members.

In addition, the following guidance applies to personal days:

- The wedding of a non-family member, family vacations, and family reunions are considered personal days.
- Unless required by the School, conferences will be considered personal days.
- Normally, only one personal day may be taken per month.
- Employees should not plan to take a personal day during the month of May due to the busy tempo during the last month of School.
- Planned personal days must be cleared with fellow staff well in advance.

Employee Grievances

Employees who have a concern or grievance with regard to the operation of the School should address said issue using the following steps as a guide:

- A concern or grievance regarding a co-worker should first, when possible, be addressed to that co-worker before involving a second party.
- A concern or grievance regarding facilities, or staff personnel (after attempting to work
 out the issue with the staff member) should first be addressed with the staff member
 serving in the "Conflict Mediator" role. If the issue is not resolved through that person's
 participation in the process, the employee should bring the issue to the full staff.
 - Note: If the issue would be problematic to bring to the full staff for reasons of privacy or other significant constraining circumstance, the employee may reach out to the chair of the board of directors. The chair will determine whether resolution of

the issue should be overseen by the CEO or should be elevated to a sub-committee of the board of directors.

- Obviously, certain issues may affect more than one person, so more than one individual
 may bring a concern to the full staff or chair of the board of directors. Nonetheless,
 experience has shown that when efforts are made to build a case with multiple
 employees, the effort can lead to misrepresenting their views. Thus, it is preferable to
 speak directly from one's own experience and to address one's concerns individually.
- The concern or grievance should be presented in such a way that it is understood to be
 a grievance and not just a long-term problem to be worked on as the School grows and
 improves.
- Questions about this policy should be addressed to the CEO.

COMPENSATION AND BENEFITS

Individual Pay

Employee pay and benefits will depend on sustained performance over time and the School's budget. Outstanding individual performance or increased job responsibilities may influence pay. In general, an employee's compensation and benefits are influenced by three factors:

- the nature and scope of the job,
- individual performance and qualifications, and
- school budget and fiscal status.

All employees will receive an official contract outlining salary, benefits, and responsibilities by July 15th of each current academic year. Provisional letters of appointment will be issued by April 15th for a following academic year.

• Example: An employee of SBMHS teaching during the 2020 – 2021 academic year will receive a provisional letter of appointment by April 15, 2021 that outlines expected salary, benefits, and responsibilities for the 2021 – 2022 academic year if they are on pace to be retained. These letters are not contracts and are for informational purposes only. A contract will be issued by July 15, 2021 to confirm – or adjust – the contents of the provisional letter of appointment based on the school's financial position.

Employees are encouraged to **read their contracts carefully**. As a micro school, SBMHS can be materially harmed by an employee's failure to fulfill the requirements and expectations of his/her contract, especially in regard to providing appropriate notice for voluntary termination of employment. **Contract terms will be enforced.**

Employees of the School will be paid on the last day of each month. Payments will only be accomplished via direct deposit to checking or savings accounts in the name of the employee. There will be no advances or alternative pay dates.

Benefits

Full-time employees of SBMHS will be eligible to participate in the benefits provided by the School. Participation in these benefits will be subject to the terms and conditions described in the official plan documents. The employee's share of the premium cost for the insured benefits will be determined on an annual basis and communicated to eligible employees prior to open enrollment. The nature and level of benefits is contingent upon the financial position of the school.

STANDARDS OF CONDUCT

Since teachers are *de facto* role models for their students, all teachers should adhere to a high standard of personal conduct. To this end, they should speak and act with propriety at all times.

Community Relations

The success of SBMHS depends in no small part upon the quality of the relationships between the School and the surrounding community. Everyone who works at SBMHS is in a sense the School's ambassador. The more goodwill employees promote, the more the community will respect and appreciate the School. Pleasant relations are best fostered by observing the following habits of courtesy:

- act competently and deal with individuals in a courteous and respectful manner,
- when in a public setting always maintain your composure, and respond to questions in a polite, positive, and professional manner, and
- when given the opportunity to promote SBMHS, refrain from doing so by disparaging other specific institutions.

Media Relations

Despite the foregoing policy, an employee is not an official spokesperson for the School. That office belongs to the CEO and the Board Chair. Other employees may speak to members of the press with prior approval from the CEO. Any employee who is contacted by the press should defer comment and inform the CEO immediately.

Disciplinary Actions, Suspensions, and Dismissals

Unacceptable behavior, violations of policies and procedures, and/or performance issues may lead to disciplinary action or immediate dismissal. Accusations of misconduct may result in

suspension pending investigation. As the "on the ground" link to the board of directors, the CEO has the authority to enact immediate suspensions of school employees.

DRESS CODE, PERSONAL APPEARANCE, & HYGIENE

The perception of SBMHS by outside entities is impacted by the level of professionalism exhibited by its employees.

The Board expects all employees to dress and conduct themselves in a professional manner whenever conducting School business or wearing clothing or uniforms that identify them as employees of the School.

Although no day-to-day dress code is specified, employees are expected to display sensitivity to dress code standards of community partners when engaged in work outside of the SBMHS campus.

APPRAISALS

Employees will be provided both informal and formal feedback. Informal feedback may take the form of a side- bar conversation, a brief written note, or any other type of unstructured communication. Formal feedback will be provided once annually via an established "360" process. Employees will receive their documented annual appraisals in a private appointment with the chair of the board of directors' Personnel Team toward the end of the school year. A signature on the appraisal form signifies acknowledgement of receipt. Employees will be given a copy of their annual appraisal after all signatures have been collected.

TECHNOLOGY

All electronic communications to, from, about, or on School premises or at School-related events shall reflect the principles upon which the School is founded in support of its educational goals.

The following Communication and Computer Systems Usage and Security Policy contains basic guidelines for the use, access, and disclosure of communications using any type of electronic device (including, among other things, telephone, mail, e-mail, voice mail, desk and laptop computers, pagers, mobile/smart phones, camera phones, video cameras, text messages, electronic game devices, faxes or facsimiles, internet, and intranet) sent, received, viewed, used, or shared by employees using any School-provided Communication or Computer Systems or other personal electronic devices on campus or at School-related events ("Systems").

Note that in some cases, use of personal electronic devices at home or away from campus are covered by this policy where such communications impact the School, are to/from employees

and students, parents, or third parties, such as communications on the Internet or on social networking sites.

Communication and Computer Systems Usage and Security Policy

The School's Systems are intended for School business only. Use of the School's Systems for accessing or acquiring information and materials inappropriate to a School environment is against School policy and is prohibited. All information transmitted or stored in School Systems (e.g., employee lists or information, student lists or information, donor lists or information, documents relating to policies and procedures) is the sole and exclusive property of the School and should be treated as confidential. Such information may not be disclosed to any person outside of the School nor may any such information be removed from the School's premises without the express permission of the Principal.

Employees are strictly prohibited from accessing, reading and copying data or information stored in the Systems and from accessing, reading and copying communications not directed to them without prior authorization.

All Systems messages are School records. The contents of your school-issued Systems may be disclosed to the board of directors or CEO without your permission. Therefore, you should not assume that messages and communications are confidential.

PRIVACY

Family Educational Rights Privacy Act (FERPA)

The Family Educational Rights and Privacy Act (FERPA) afford parents and students over 18 years of age certain rights with respect to the student's education records. These rights are: The right to inspect and review the student's education records within 45 days of the day the School receives the request for access. Parents or eligible students should submit to the School CEO or appropriate School official a written request that identifies the record(s) they wish to inspect. The School official will make arrangements for access and notify the parent or eligible student of the time and place where the records may be inspected.

The right to request the amendment of the student's education records that the parent or eligible student believes are inaccurate or misleading. Parents or eligible student may ask the School to amend records that they believe is inaccurate or misleading. They should write the CEO or appropriate official, clearly identify the part of the record they want changed, and specify why it is inaccurate or misleading. If the School decides not to amend the record as requested by the parent or eligible student, the School will notify the parent or eligible student of the decision and advise them of their right to a hearing regarding the request for

amendment. Additional information regarding the hearing procedures will be provided to the parent or eligible student when notified of the right to a hearing.

The right to consent to disclosures of personally identifiable information contained in the student's education records, except to the extent that FERPA authorizes disclosure without consent. One exception, which permits disclosure without consent, is disclosure to School officials with legitimate educational interests. A School official is a person employed by the School as an administrator, supervisor, instructor, or support staff member (including health or medical staff and law enforcement unit personnel); a person serving on the Board of Directors; a person or company with whom the School has contracted to perform a special task (such as an attorney, auditor, medical consultant, or therapist); or a parent or student serving on an official committee, such as a disciplinary or grievance committee, or assisting another School official in performing his or her tasks. A School official has a legitimate educational interest if the official needs to review an education record in order to fulfill his or her professional responsibility. Upon request, the School discloses education records without consent to officials of another School district in which a student seeks or intends to enroll.

The right to file a complaint with the U.S. Department of Education concerning alleged failures by the School to comply with the requirements of FERPA. The name and address of the Office that administers FERPA are:

Family Policy Compliance Office U.S. Department of Education 400 Maryland Avenue, SW Washington, DC 20202-4605

Eileen P. Mariani

PROFESSIONAL SUMMARY

Educator licensed in the state of Indiana and credential in Montessori education. Committed to the creation of an urban Montessori High School in South Bend, Indiana.

PROFESSIONAL INTENT

To model the mission of the existing Good Shepherd Montessori School and create an urban Montessori high school using a neighborhood based school approach with a commitment of accessibility to low-income families and children who have not previously been Montessori educated.

WORK HISTORY

JANUARY 1994 - JUNE 1996

Montessori Aftercare Supervisor | The Montessori Center | South Bend, IN Responsible for care of students and organization of the indoor environment

JUNE 1995 - AUGUST 1996

Summer Camp Coordinator | The Montessori Center | South Bend, IN Responsible for set-up of outdoor environment and development of lessons

JULY 1996 - AUGUST 2006

Triton Junior-Senior High School | Bourbon, IN

Science Teacher Grades 7-12

Planetarium Director

Responsible for developing cross-curriculum programs

Varsity Girls' Softball Coach
7th Grade Girls' Volleyball Coach

JULY 2006 - JUNE 2019

Montessori Guide | Good Shepherd Montessori School | South Bend, IN Upper Elementary Guide Grades 4-6 Member of the Curriculum Development Team

EDUCATION

1992

Bachelor of Arts: Environmental Science

University of Illinois at Urbana-Champaign, IL

1996

Indiana Teaching License K-12 : Science

Indiana University South Bend, South Bend, IN

2004

Masters in Education : Science Indiana University, South Bend, IN

2008

Montessori Credential: Elementary

Columbus Ohio Montessori Educational Training, Columbus, OH

ERIC NATHANAEL OGLESBEE



EDUCATION				
2005 - 2008	Indiana University (Bloomington, IN)			
	 Ph.D. in General Linguistics conferred July, 2008 			
	 Minor: Speech and Hearing Sciences 			
2002 – 2005	Indiana University (Bloomington, IN)			
	• M.A. in General Linguistics conferred February, 2005			
1997 – 2002	Bethel College (Mishawaka, IN)			
1997. 2002	• B.A. (summa cum laude) in Mathematics and Biblical Literature conferred			
	May, 2002.			
	• June – July 2000: Participant in NSF Mathematics REU site at Hope College			
	(Holland, MI)			
	 Sept. – Dec. 1998: Participant in semester abroad program at Jerusalem University College (Jerusalem, Israel) 			

EMPLOYMENT HISTORY					
July 2019 - June 2020	Founders Program Fellow, The Drexel Fund • South Bend Montessori High School				
July 2017 - Present	Executive Director: Montessori Consortium of the Great Lakes at Good Shepherd Montessori School, South Bend, IN				
May 2017 - Jan. 2019	Director of Linguistic Research and Development, Founder: Voicli, Inc., South Bend, IN				
Jan. 2016 – June 2017	Director of Development: Montessori Consortium of the Great Lakes at Good Shepherd Montessori School, South Bend, IN				
Aug. 2008 – Dec. 2015	 Assistant/Associate Professor of Linguistics: Bethel College, Mishawaka, IN Tenured and promoted to Associate Professor beginning in 2015 - 2016 academic year 				
May 2007 – June 2007	 Associate Instructor of Linguistics: Indiana University, Bloomington, IN L103: Introduction to the Study of Language 				
Jan. 2006 – May 2006	 Associate Instructor of Linguistics: Indiana University, Bloomington, IN L541: Introductory Phonetics Primary Instructor: Kenneth de Jong 				
Aug. 2005 – May 2008	Research Assistant: NSF Grant 0446540, "Prosodic Position in Cross Language Perception and Production" • Principal Investigator: Kenneth de Jong				
May 2005 – May 2008	Research Assistant: NIH Grant R01-DC02229 to Indiana University, "Perception of Speech by Normal and Impaired Listeners" • Principal Investigator: Diane Kewley-Port				

Aug. 2004 – July 2005 Research Assistant: NIH Grant 5R01DC005594-03, "Phonological Systems of Pediatric

Cochlear Implant Users"

• Principal Investigator: Steven B. Chin

May 2004 – July 2004 English Instructor: Shi Li English Academy, Beijing, China

Aug. 2002 – May 2004 Associate Instructor of Mathematics: Indiana University, Bloomington, IN

• M025: Pre-Calculus

• J112: Intro. To College Math II

Aug. 2000-May 2001 Divisional Assistant (Part-Time): Division of Mathematics and Computer Science, Bethel College, Mishawaka, IN

Aug. 1999-May 2000 Divisional Assistant (Full-Time): Division of Mathematics and Computer Science, Bethel College, Mishawaka, IN

HIGHER EDUCATION EXPERIENCE

TEACHING

Teaching Philosophy: I believe in integrating multiple modes of teaching in my classroom, including lecture, discussion, and hands-on experience.

I was the primary instructor for the following courses at Indiana University:

L103: Introduction to the Study of Language

M025: Pre-Calculus

J112: Introduction to College Mathematics II

I was the primary instructor for the following courses at Bethel College:

LANG 101: Introduction to the Study of Language

LANG 201: Introduction to Phonetics

LANG 204: Language and Culture

LANG 335: Theories and Practice of Second Language Acquisition

LANG 431: TESOL Practicum

ENGL 101: Written Communication II

ENGL 304: Introductory Linguistics

MATH 070: Pre-algebra

Developed online version for Bethel College

MATH 106: Elementary Algebra

MATH 107: Algebraic Modeling and Trigonometry

Developed online version for Bethel College

MATH 111: Basic Probability and Statistics

Developed online version for Bethel College

MATH 122: Pre-calculus

MATH 124: Applied Calculus

MATH 286: Applied Mathematics for Business

• Developed online version for Bethel College

INSTITUTIONAL SERVICE AT BETHEL COLLEGE

Feb. 2015 – Dec. 2015 Campus Technology Team

- The Campus Technology Team explored, introduced faculty to, and trained them on, available classroom technologies. Primary roles:
 - served as bridge between college IT department and traditional faculty,
 - · researched and piloted novel teaching tools, and
 - led training sessions for faculty.

Aug. 2014 – Dec. 2015 Faculty Development Committee

• The committee planned regular faculty workshops and fall faculty retreat.

Aug. 2013 – Mar. 2014 Member of President's Transition Council (PTC)

 The PTC was formed to assist Bethel College's newly hired president as he defined strategic goals for Bethel College. The committee included a select group of faculty, staff, and Missionary Church constituents.

May 2011 – Jan. 2012 Committee for COL proposal (ad hoc committee)

• In April 2011, a proposal came to the Academic Policy and Curriculum Committee (APCC) that involved giving college credit for courses that were previously considered "remediation" (i.e., COL courses). In response to the proposal, a special committee was formed in order to reexamine remediation policies. Over the next 6 months, the committee drafted a substantially revised proposal that addressed faculty concerns and the revised proposal was accepted by APCC and the full faculty.

Aug. 2010 – April 2013 Academic Policy and Curriculum Committee (APCC)

• APCC is the primary academic committee on Bethel's campus. All changes to academic programs and policies go through APCC prior to presentation to the full faculty. Elected to a 3-year term (maximum possible) in August, 2010.

Sept. 2010 – Feb. 2013 Retention Task Force

 In an attempt to address retention concerns, the vice president for Life Calling and Student Enrichment selected members from the Bethel College community to meet periodically and discuss strategies for increasing student retention. The committee met every 6 weeks to discuss research concerning retention and develop action steps for the college.

Summer 2010 Freshman Year Experience (FYE) Task Force

 Since the mid-90s, Bethel College has had an active Freshman Year Experience program. During the summer of 2010, a task force was formed to evaluate current practices and make recommendations for changes. As a former FYE participant and FYE student mentor, as well as a current (at the time) FYE professor, I was asked to serve on the committee.

July 2009 – May 2014 Faculty Advisor to Student Council

• In Spring 2009, the Bethel College Student Council (StuCo) proposed changes to its constitution and by-laws concerning the selection of student representatives. The

changes were in response to minimal interest in running for student government; however, I had serious reservations concerning their proposed solution. After expressing my concerns to the rest of the faculty, the proposed amendments were withdrawn. I volunteered to take over as the faculty advisor in order to assist in rebuilding the organization. During Fall 2009, we worked to revise the representative structure for student government, and the proposal passed through the faculty and Administrative Committee unanimously. Following that, I worked with StuCo to establish multiple "traditional" events, revamp its administrative structure and record keeping, and help create a vision for the future.

Aug. 2009 - May 2010

Administrative Committee

 The Administrative Committee primarily consisted of department heads and deans from across campus and existed to support the president. In Fall 2009, I was elected to a one-year term on Bethel College's Administrative Committee (faculty were allowed two representatives).

ADDITIONAL ACTIVITIES AND STUDENT ADVOCACY AT BETHEL COLLEGE

December 2015

Scouted Da Nang, Vietnam as TESOL Practicum Site

Using personal funds and grants from outside agencies, I travelled to Vietnam to do a
site visit for a new TESOL practicum site. This new site is now available for both
summer and semester long practicum options. In Summer 2016, three Bethel College
students traveled to Vietnam for their practicum. Related to this work, in June 2016,
I personally hosted a one-week U.S. cultural experience for 11 Vietnamese students
in South Bend, Indiana.

October 2013

Teaching English to Speakers of Other Languages (TESOL) Major

• In October 2013, I successfully defended a proposal for establishing a TESOL major at Bethel College. The new major was added to the 2014 – 2015 course catalog. In its first year, 10 students declared for the major.

March 2012

Scouted LCC International University (Klaipeda, Lithuania) as TESOL Practicum

Site

Using all of my professional development funds to attend an interdisciplinary
conference at LCC International University, I travelled to Lithuania to do a site visit
exploring LCC as a new practicum site. In Summer 2013 I personally led a group of
five Bethel College students for a one-month practicum experience.

Jan. 2012 - Jan. 2013

"iPad for Everyone" Campaign

• Based on my own experience with an iPad, I proposed a project to investigate the possibility of issuing iPads to all Bethel students and faculty. The project involved working with bookstore personnel and the CFO of the college, as well as collecting and analyzing survey data from faculty in order to assess the costs/benefits of adopting iPads campus-wide. In addition, I oversaw a 22-person (11 faculty and 11 students) pilot project for the 2012 – 2013 academic year to examine the issue from faculty and student perspectives, with the goal being campus-wide adoption. As a part of the project I worked with Apple to generate product quotes and developed a draft version of an implementation plan. Although campus-wide adoption of iPads did not occur, the results of the study laid the foundation for a "faculty mobile technology initiative" the following year.

July 2011

TESOL Task Force to Alcoy, Spain

• In July 2011 I led a group of Bethel College students to Alcoy, Spain, where for four weeks they staffed English camps for children and adult English night classes. Some of our students (3) completed a TESOL practicum, while other students (4) went as program volunteers. I was responsible for planning/organizing the trip, which involved coordinating multiple arrival/departure times and maintaining the budget.

Fall 2010

Commuter Lounge

 Because of Bethel College's urban setting, the school attracts a large number of commuter students. I observed that in our primary academic building there was not a dedicated space for commuter students to study and/or relax, other than a large, sterile computer lab. I successfully negotiated the conversion of a first floor conference room into a commuter lounge, and Student Council funded the purchase of comfortable furniture.

January 2009

Teaching English to Speakers of Other Languages (TESOL) Minor

• In January 2009, I successfully defended a proposal for establishing a TESOL minor at Bethel College. The minor was revised in 2010 and 2013 in order to make it more accessible to students.

AWARDS AND HONORS

2006		Best Student Paper Competition (Speech Communication) – Second Place: 4th joint				
		meeting of the Acoustical Society of America and Acoustical Society of Japan. Honolulu,				
	HI.					

2003 Indiana University Travel Grant (\$300)

2002 Bethel College: Graduated Summa Cum Laude

2001 Outstanding Senior Mathematics Major: Division of Mathematics and Computer

Science, Bethel College (Mishawaka, IN)

1999 Natural Sciences Division Underclassman Award: Division of Natural Sciences, Bethel

College (Mishawaka, IN)

1999 Biblical Literature Major Award: Division of Religion and Philosophy, Bethel

College (Mishawaka, IN)

RESEARCH

Research Interests: Identification of acoustic cues in consonants. Cross-language perception. Development of interactive search algorithms for examining categories in multidimensional stimulus spaces. Speech synthesis techniques. Effects of speech perception training on accentedness, intelligibility, and comprehensibility in speech production.

PUBLICATIONS

Oglesbee, Eric and Kewley-Port, Diane (2009). Estimating vowel formant discrimination thresholds using a single-interval classification task. *J. Acoust. Soc. Am.* **125(4)**, 2323-2335.

Oglesbee, Eric (2008). Multidimensional Stop Categorization in English, Spanish, Korean, Japanese, and Canadian French. Doctoral dissertation from Indiana University, Bloomington. Defense date: July 10th, 2008

Oglesbee, Eric and de Jong, Kenneth (2007). Searching for best exemplars in multidimensional stimulus spaces. *J. Acoust. Soc. Am.* **122** (4), EL101 – EL106.

Oglesbee, Eric and de Jong, Kenneth (2006). Locating perceptual category centers in multidimensional stimulus spaces. *IULC Working Papers Online*, 6-06.

RESEARCH EXPERIENCE

Research project responsibilities included: data collection, statistical data analysis, speech synthesis, designing and programming subject interfaces, preparing and presenting conference posters, preparing manuscripts for publication, and identifying new lines of inquiry.

- **July 2008 July 2010** Research Consultant: NSF Grant 0446540, "Prosodic Position in Cross Language Perception and Production"
 - Principal Investigator: Kenneth de Jong
- July 2008 Jan. 2009 Research Consultant: NIH Grant R01-DC02229 to Indiana University, "Perception of Speech by Normal and Impaired Listeners"
 - Principal Investigator: Diane Kewley-Port
- Aug. 2005 Jul. 2008 Research Assistant: NSF Grant 0446540, "Prosodic Position in Cross Language Perception and Production"
 - Principal Investigator: Kenneth de Jong
- May 2005 July 2008 Research Assistant: NIH Grant R01-DC02229 to Indiana University, "Perception of Speech by Normal and Impaired Listeners"
 - Principal Investigator: Diane Kewley-Port
- Aug. 2004 July 2005 Research Assistant: NIH Grant 5R01DC005594-03, "Phonological Systems of Pediatric Cochlear Implant Users"
 - Principal Investigator: Steven B. Chin

PRESENTATIONS

- Oglesbee, Eric (2010). Language differences in the perceptual content of laryngeal contrasts: the role of VOT and FO in indicating contrasts in Korean, Japanese, English, and Spanish. *Presented as a paper at the 2010 annual meeting of the Linguistic Society of America in Baltimore, MA. (January 7th 10th)*
- Oglesbee, Eric, and de Jong, K. (2007). The relation between focus effects in production and exemplar locations in perception for stop types in English, Japanese, and Korean. *J. Acoust. Soc. Am., 122*, No. 5, Pt. 2, 2996. Presented in November December at the 154th meeting of the Acoustical Society of America, New Orleans.
- Oglesbee, Eric, and de Jong, K. (2006). Finding perceptual categories in multi-dimensional acoustic spaces. *J. Acoust. Soc. Am., 120*, No. 5, Pt. 2, 3249. Presented in November – December at the 4th joint meeting of the Acoustical Society of America and the Acoustical Society of Japan, Honolulu.
- Oglesbee, Eric, and Kewley-Port, D. (2006). Comparing vowel formant thresholds from two tasks: classification versus 2AFC adaptive tracking. *J. Acoust. Soc. Am., 120*, No. 5, Pt. 2, 3129. Presented in November December at the 4th joint meeting of the Acoustical Society of America and the Acoustical Society of Japan, Honolulu.
- Kewley-Port, Diane, Oglesbee, E., and Lee, J.H. (2005). Thresholds for vowel formant discrimination using a sentence classification task. *J. Acoust. Soc. Am.*, *118*, No. 3, 1929-1930. Presented in October at the 150th meeting of the Acoustical Society of America, Minneapolis.
- Oglesbee, Eric, and Chin, S.B. (2005). Acquisition of laryngeal phonology by pediatric cochlear implant users. Presented in March at the 10th Symposium on Cochlear Implants in Children, Dallas.
- Port, Robert F., and Oglesbee, E. (2003). Rhythmic Timing in Speech. *J. Acoust. Soc. Am., 114*, No. 4, 2394. Presented in November at the 146th meeting of the Acoustical Society of America, Austin.
- Oglesbee, Eric (2000). A tale of two tapes: A continuous time differential equation model of the competition between Beta and VHS. Presented in July at Grand Valley State REU mini-conference, Grand Rapids.

PROFESSIONAL ORGANIZATIONS AND SERVICE

2005 - 2015

Acoustical Society of America

2009 - 2015

Linguistic Society of America

Reviewer for the Journal of Phonetics

DEVELOPMENT EXPERIENCE

DESCRIPTION OF WORK AT GOOD SHEPHERD MONTESSORI SCHOOL (GSMS)

In August 2015, Good Shepherd Montessori School (GSMS) received a \$60,000, 1-year grant from the Dekko Foundation to fund a Director of Development position. Prior to receiving the grant, GSMS had neither a Director of Development nor a comprehensive, systematic fund development plan. The newly created position had dual responsibilities: facilitate development activities for GSMS and build the Montessori Consortium of the Great Lakes (MCGL), an organization dedicated to advancing educational best practices according to the vision of Maria Montessori.

From January 2016 - December 2016, the following were accomplished:

- made 196 visits with potential prospects and partners for GSMS and the MCGL,
- submitted 12 grant proposals to fund improvements to public spaces for consortium events,
 - 7 funded for a total of \$56,500
- submitted 10 unsolicited grant proposals to foundations within St. Joseph County for operational funding,
 - 1 funded for a total of \$2,650
- established 2 new sustainable annual fundraising campaigns,
 - "Chiaravalle Week" in April raised \$24,000 in 36 hours by recruiting a \$10,000 lead challenge gift
 - "Sustaining Benefactor Campaign" in September added \$1,400 in recurring monthly gifts (\$16,800 annual impact) from 33 donors
- created a web presence for the MCGL (MontessoriConsortium.org),
- organized an October symposium at GSMS featuring David Kahn, a prominent international figure in Montessori education.
 - worked with area colleges and universities to facilitate access to the symposium for current students
- developed procedures for segmenting donor base and creating custom communications (electronic and physical) for funding requests and updates, and
- using historical giving and enrollment data, developed criteria for modeling development and enrollment income to establish fiscal year benchmarks and increase accuracy in the budgeting process.

Following completion of the grant, I remained the Director of Development for GSMS and the MCGL for an additional 6 months. Beginning July 1, 2017, I moved to a part-time Executive Director role with the MCGL (450 hours/year). Current projects include:

- developing a sustainable, replicable approach to high school Montessori education,
- providing broad accessibility to local Montessori expertise (i.e. Montessori consulting services)
- creating shared data pools to facilitate research into Montessori methodology,
- facilitating opportunities for local engagement and collaboration regarding common challenges and questions faced by Montessori schools, and
- establishing local, certified Montessori training opportunities connected to college/university teacher training programs.

ENTREPRENEURSHIP EXPERIENCE

BUSINESS

DESCRIPTION OF WORK AT VOICLI, INC.

In May, 2017 I partnered with a local technology entrepreneur to launch Voicli, a linguistics-based voice analytics company. In cooperation with two multi-national companies – one who provides sales training and another who markets communication profile analyses – Voicli sought to develop discourse-based automated voice analysis tools.

In November 2017 Voicli, Inc. received approval from the state of Indiana to issue up to \$1M in venture capital tax credits for qualified investment. In May 2018 the company was awarded a \$20k investment from the Elevate Ventures Community Ideation Fund to support production of a Minimum Viable Product (MVP). Unfortunately, due to actions by another company in misusing Indiana's venture capital tax credit system, Voicli, Inc. was prevented from closing a significant investment which would have provided \$500k - \$700k in operating funds and a \$4M line of credit. Consequently, Voicli, Inc. declined the Elevate Ventures award and I moved out of day-to-day operations and into a consultancy role in January, 2019.

PROVISIONAL PATENT

Oglesbee, Eric. "Systems and methods for generating human-like language tokens encoded with linguistic and non-linguistic information for use in natural language processing applications", *Provisional Patent Filed December 4*, 2017.

EDUCATION

DESCRIPTION OF WORK WITH THE DREXEL FUND

Participant in intensive, year-long fellowship to study educational best practices in innovative school environments. Training has included instruction on developing policy manuals, budgeting, student recruitment, executive organization, business plan development, marketing, and meeting the needs of low-income families. Founding board president of South Bend Montessori High School.

Patrick Newsom

EDUCATION

Sarah Lawrence College, Bronxville, NY

Bachelor of the Arts, May 2017

Concentrations: English Literature and Creative Writing

Columbia University, Teachers College New York, NY

Master of the Arts in Teaching, May 2019

Certification: Secondary Humanities Education

SKILLS: Google Office Suite, Certified Physical Training Instructor, *Understanding by Design* (Wiggins & McTighe 1998) Curriculum Design, Inquiry Based Learning Curriculum Design, Project-Based Learning, Teaching of Poetry

WORK EXPERIENCE

Lasalle Intermediate Academy, South Bend, IN

08/19- present

7th Grade Reading Teacher

- Facilitates the learning of 7th graders in the discipline of Reading, primarily those who have scored in the bottom 25% of Lasalle's NWEA test takers
- Plans, develops, and organizes all lesson plans and units under the guidance of the philosophies of Kylene Beers and John Murray
- Collaborates with school's librarian to best provide opportunities for reading and student growth in an open and free space

Columbia University, Teachers College, Department of Humanities, New York, NY

Program Associate

08/17-05/19

- Assists faculty of the Humanities Program to prepare for their classes
- Provides administrative assistance to the Program Secretary and students
- Manages program data files, including curriculum design resources and student records
- Organizes department events, such as guest lectures and job fairs, under the supervision of Senior Program Associate

Laguardia High School, New York, NY

10th Grade British Literature Student Teacher

01/19-05/19

- Implements Inquiry Based Learning in the classroom, supplemented by works such as *The Tempest*, *Pride and Prejudice*, and poems of the Romantic Era.
- Designs units under Wiggins and McTighe's "backwards design" methods and practices.
- Engages one-on-one with students to provide additional ELA support in tutoring sessions. On average, help to raise students' grades by one level (for example, a "C" to a "B").

Special Music School, New York, NY

Middle School Student Teacher

08/18-12/18

- Observed the teaching of grades 6 and 7 under the supervision of a master ELA teacher
- Implemented Constructivist Learning lessons to 8th grade students featuring the poems of Billy Collins, Naomi Shihab Nye, and Jack Gilbert
- Utilized the student workshop model (as conceived by Nancie Atwell) to teach students the art of memoir writing

Thomas Jefferson Middle School, Stamford, CT

8th Grade English Language Arts Summer School Teacher

06/18-07/18

- Instructed 8th grade students in English Language Arts to prepare them for state exams (ISTEP)
- Implemented Inquiry Based Learning in the classroom supplemented by novels such as *The Giver, Bridge to Terabithia, The Absolutely True Diary of a Part-Time Indian,* and *Ready Player One* amongst other forms of text.
- Assisted After-School Care Staff and supervised students during their "pick up time."

Sarah Lawrence Sub-Saharan Africa Community Works, Tanzania, Malawi, and Zimbabwe

Curriculum Developer and Editor of Anthology of East and Southern African Everyday Poets

12/15-05/16

- Developed sustainable, progressive education curricula to be implemented in Eastern And Southern African Contexts
- Organized and facilitated Creative Writing workshops for students in these contexts
- Managed Hootsuite Social Media Dashboard for all programs' events and updates
- Edited all entries from workshops to be included in anthology

SUPPLEMENT EXPERIENCE

Teachers College Professional Development Workshop Series, New York, NY

01/18-12/18

- Notable workshops include:
 - o "Critical Reading: Teaching Adolescents to Read the World" with <u>Dr. Deborah Appleman</u>
 - o "Queer Literacy Pedagogy, or Teaching English" with Dr. Cammie Kim Lin
 - o "The Academic Writing Apprenticeship: The Commentary Project" with <u>Dr. Sheridan Blau</u>
 - o "Teaching for Joy and Justice" with Dr. Linda Christensen

Sarah Lawrence College Literary Review Magazine, Bronxville, NY

Poetry Editor 09/15-05/17

- Reviewed Poetry submissions to *The Review*
- Coordinated with co-editors on acceptance decisions of submissions
- Attended all publicity events and provided informational support to the Editor-in-Chief

HONORS/AWARDS: Winner of the "Awesome Without Borders" Grant (2019); Recipient of Dean's Scholarship for Sarah Lawrence College (2013- 2017); Alice Stone Ilchman Scholar Athlete Award (2017); Lipkin Family Prize for Poetry (2017); NCAA DIII Men's Cross Country Coaches' Award (2014-2017); NCAA DIII Skyline Sportsmanship Team (2016 and 2017); NCAA DIII Academic All Conference Team (2014-2017); Sarah Lawrence College Men's Cross Country Team Captain (2014-2017)







Greetings,

My name is Castle O'Neill and I currently serve in the role of Director of Emerging Hub Schools with Wildflower Schools. I am writing in support of South Bend Montessori High School's (SBMHS) application for immediate Freeway Accreditation from the state of Indiana.

Since 2018, members of the founding team of SBMHS have been in communication with partners at Wildflower Schools regarding the launch of their high school. Over time, these conversations evolved into the school's founding teachers initiating in late 2019 the formal process for exploring affiliation with Wildflower Schools. Launching a school within our network involves a three-step process, beginning with *Exploration*, then progressing to *Planning*, followed by *Startup* (information can be found online at

<u>https://wildflower.papyrs.com/School-Startup-Roadmap</u>) about what each step entails). Toward the end of the *Planning* stage, schools sign a formal affiliation agreement.

The SBMHS team has recently completed their *Exploration* phase and are now moving into *Planning*. Although most schools require 9 - 12 months to execute the *Planning* stage, the SBMHS team has already completed much of the work for launching a school through its partnership with the Drexel Fund, as Dr. Eric Oglesbee, one of the SBMHS co-founders, is currently a fellow within their *Founders Program*.

Should the SBMHS team continue on its affiliation journey, I anticipate all parties being ready to sign an affiliation agreement by May 1, 2020. If for some reason affiliation should not take place and SBMHS does not become a member of our network, we will be excited to have SBMHS as a thought partner and will provide advice and non-financial support as we are able.

Sincerely,

Castle O'Neill

Castle Orall