

# *Waterford Montessori Academy*



*Montessori nurtures curiosity, creativity &  
imagination.*

# Waterford Montessori Academy

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## **PROJECT OVERVIEW**

### **Introduction**

Waterford Montessori Academy, a Michigan charter school authorized by Saginaw Valley State University as of December, 2012, opened in September 2013 serving 92 students in kindergarten through grade 3. Over the past five years, the Academy has expanded its grade level offerings to include kindergarten through grade 7 currently serving over 250 students. The Academy has received approval from Saginaw Valley State University to expand its grade offerings to include grade 8 and plans to open a new facility with all middle school programming (grades 6-8) being relocated to this new facility where the original K-3 programming will also be replicated. Accordingly, as an eligible applicant, Waterford Montessori Academy seeks federal charter school grant funding under CFDA 84.282E for the Replication and Expansion of High-Quality Charter Schools, for the purpose of “expanding opportunities for all students, particularly traditionally underserved students.” Funds from this grant will be used to specifically implement an expansion of Waterford Montessori Academy and thereby positively impact student achievement in Waterford Township and surrounding communities. Saginaw Valley State University was notified of the Academy’s intent to apply for this grant. In response, a March 24, 2018 e-mail from Dr. David Lewis, Director of the School/University Partnership Office at Saginaw Valley State University documents the authorizer’s support of this application (included in Appendix G).

### **Community Demographics**

Waterford Township, Michigan founded in 1834 was originally a central site for fur traders and lumberman. Today, Waterford Township is largely an urban setting. Comprising approximately 10.9 square miles, Waterford lies at the center of Oakland County (Michigan)

neighboring communities of Pontiac, Clarkston, Keego Harbor, White Lake and West Bloomfield. Waterford is thirty miles northwest of Detroit and thirty miles south of Flint.

The population of Waterford Township is largely Caucasian (87%) with a relatively significant African American population (8%) and a growing Latino population (5%). As with most Southeast Michigan communities Waterford is home to a diverse populace. Foreign-born residents (1,124 = 4.8% of total population) have emigrated from all over the globe.

### **Unmet Educational Need**

*Adequate* and *average* are not the adjectives a parent wants to hear regarding their child(ren)'s schools. Unfortunately, these terms are all too familiar in describing many of the local schools throughout Michigan. They can also be used to describe the schools serving Waterford Township in zip code 48329 and nearby zip codes including 48327, 48328, 48430, and 48432. Within these zip codes, the public schools' 2016 "top to bottom" scores range from 10 to 89 ([http://www.michigan.gov/mde/0,4615,7-140-81376\\_81377\\_56562---,00.html](http://www.michigan.gov/mde/0,4615,7-140-81376_81377_56562---,00.html)). Under Michigan's current accountability system, two area charter schools have been identified for comprehensive support and intervention (Great Lakes Academy and Sarah J Webber Media Arts Academy). What is of most concern to parents is that "adequate" and "average" schools are failing their students.

Across the nation, a whole new paradigm must be introduced to ensure that all students are able to matriculate through secondary school to graduate, subsequently attend college and ultimately compete in an increasingly global economy. More than five years ago, a group of parents in the Waterford community formed the Waterford Montessori Academy. By opening the Waterford Montessori Academy (WMA), a tuition free public school in Oakland County

(population 1,202,362), WMA opened with a specific elementary educational program that employs the proven and tested Montessori Method.

Based on the demographics of the Waterford community, the level of poverty and crime (though modest in comparison to neighboring communities) along with the current state of the Waterford public school system, it is apparent that the unmet educational needs are:

- Parents and students need greater choice in their educational options.
- Current local programs do not appear to be geared towards the developmental needs of students as demonstrated by the increasingly poor performance as students enter higher grade levels.
- Students need quality educational programming that improves academic performance across grade levels.
- Programming must be sensitive and responsive to the cultural needs (a growing African American and Latino population) of the community.

Most importantly, students need to be better prepared for college and beyond by developing a life-long love of learning in their developmental years. Middle school students are falling behind grade level and high school students are not college ready as evidenced by the 2015 district composite ACT score of 18. Evidence shows that an ACT score of 21 is required for college admissions into many colleges, while a score of 24 is required by the state universities and a score of 32 is needed for admission into an Ivy League school. Increased opportunities for students need to begin at the elementary school level to nurture learners who are capable of college level work upon graduation from high school.

The Waterford School District is the dominant educational provider in the area and operates a very traditional educational program with average results. The primary need in the

Waterford area is improved programmatic choice for children and families, and an educational program that better serves children with a diversity of instructional and social needs and learning modalities. The Montessori curriculum and instructional philosophy accommodates children of all learning styles, teaching them *how* to learn instead of just *what* to learn.

Montessori recognizes that since children are so different, it is unrealistic to expect that they will learn at the same rate. In the Montessori classroom, learning is reinforced internally through the child's own repetition of an activity and internal feelings of success, and children do not move on to the next skill until they have mastered the present one. Individual and group instruction adapts to students' learning styles and developmental levels, and the multi-grade age span in the Montessori classroom encourages the children to teach, collaborate and help each other. Montessori-educated children are instilled with a lifelong love of learning that prepares them and helps to ensure their future success.

Montessori education provides developmentally appropriate education for all students – this is an unmet need in all communities, including in the Waterford School District.

### **Proposed Educational Program**

Dr. Maria Montessori, an Italian physician in the early 1900's, discovered the remarkable and effortless ability of children to absorb knowledge from their surroundings. Inspired by this simple and profound truth, she developed educational materials, curricula, methodology and teacher training techniques to further children's self-creating processes. In 1907, she opened the first "Casa dei Bambini" or "Children's House", to serve the children of desperately poor families in the San Lorenzo slums of Rome. The program was based on her observations that young children learn best in a homelike setting filled with developmentally appropriate materials and experiences that contribute to the growth of self-motivated, independent learners.



Montessori's uniqueness lies in its precepts, which are somewhat counter to traditional public education. Montessori is committed to developmentally appropriate instruction based on an individual child's present needs, while traditional public education is centered on instructing children according to the needs of the average child at grade level; hence instruction is geared not to each child's needs, but to the needs of the average learner.

Montessorians believe that education needs to be child-focused and appropriate to individual needs and skill levels. Montessori education recognizes that children learn on different paths and at different rates.

In addition to the Montessori style programming, Waterford Montessori Academy will offer:

- Smaller classes for more personalized attention, with individual and small group instruction.
- An additional local educational option to the current traditional schools.
- Programs developed and designed for individual student's learning rates and styles.
- Carefully monitored progress with timely assessments.
- Administration and faculty that are culturally aware, sensitive, and understand and share a world view.
- A strong and proven Montessori curriculum.
- A safe and nurturing environment.

The opportunity to prepare college ready graduates begins with elementary school programming. This is our best prospect to provide students with a firm foundation upon which to build academic excellence.

## Expansion and Replication of Existing Charter School

Waterford Montessori Academy (WMA) has acquired an additional facility to be located approximately five miles away from the existing campus. The new facility (WMA – EL) to be located at 4350 Elizabeth Lake Road in Waterford will initially provide the same Montessori based education program to kindergarten through grade three along with middle school offerings from sixth grade through eighth grade to accommodate the current middle school students attending WMA at its 4860 Midland Avenue location. The Elizabeth Lake Road facility will then expand its grade offerings each year until a full K-8 program is offered, expanding and replicating in accordance with the Notice as published in the Federal Register on March 2, 2018. “*Replicate*, when used with respect to a *high quality charter school*, means to open a new charter school, or a new campus of a *high quality charter school*, under an existing charter...” Saginaw Valley State University, the authorizer of Waterford Montessori Academy approved this expansion at its February 16, 2015 meeting. The Elizabeth Lake Road location will be opened to students for the fall of 2018.

## Governing Board

A five member board of directors for Waterford Montessori Academy has been appointed by Saginaw Valley State University by resolution and within the existing Charter Contract. Once appointed, board members take an Oath of Public Office and are deemed to be public officials. Resumes for each of the board members have been included as an attachment to this application. Members on the Board of Directors of Waterford Montessori Academy include:

Name		
Gregory Matzelle	Board President	MA from Eastern Michigan University, LMSW
Linda E. Williams	Board Treasurer	AD Mesa Jr College San Diego CA
Kim Turner	Board Member	BS from Oakland University
LuAnne Birchmeister	Board Secretary	M Ed from Marygrove College
Patrick Carraher	Board Vice-President	BS from Michigan State University

The grant will be governed by the Board of Directors of Waterford Montessori Academy. The day-to-day management of the new Academy will be the responsibility of Theo Papatheodoropoulos. The Project Director for this grant, if received, will be Jeremy Gilliam. Grants management may be contracted to Education Management & Networks with considerable experience providing grants management to multiple community groups and public school academies throughout Michigan which previously were awarded planning grants through the State of Michigan and utilized those funds to successfully develop and implement new charter schools. Education Management and Networks, Inc. is knowledgeable about the Education Department General Administrative Regulations (EDGAR) and fiscal policies.

### **Facilities and Finances**



The Elizabeth Lake Road site is currently under development for opening in fall 2018. A Certificate of Occupancy is expected on or about August 15, 2018. The renovations to the existing building will be completed pursuant to architectural plans currently

under development by an experienced architect familiar with school building code. The scope of work will include the installation of full fire suppression and fire alarm systems; improved water service to serve the fire suppression system; electrical system upgrades; interior carpentry; replacement of all flooring; interior block work and replacement of all interior and exterior doors; reconstruction to meet ADA codes; replacement of all drop ceiling grids and pads; extension of hallways to the roof decking; construction of a utility room and replacement of the entire HVAC system.

The Board of Directors has prepared a five year budget forecast that includes this expansion project and funds the additional staffing and resources that will be needed to ensure a high quality educational program, while also building fiscally responsible fund equity. The CSP Grant Funds will be used to primarily train new staff in Montessori teaching practices and equip the new facility with a state-of-the-art computer lab in order to accommodate the mandatory on-line student assessment program, as well as to equip new classrooms with age appropriate Montessori teaching aids and supplies.

The Academy's annual financial statements are audited each year by the firm of Taylor & Morgan, PC. The 2017 audit contained no findings and determined that the financial statements were free from material misstatement. A copy of the 2017 audit has also been included as an attachment to this application.

## **COMPETITIVE PRIORITIES**

### **Competitive Preference Priority 1 - Increasing Access to High-Quality Educational Choice**

The most telling evidence of the need for additional educational options is the impetus behind the formation of Waterford Montessori Academy (WMA) which was developed and is governed by a group of local parents. WMA was not designed by a management company or one individual with desire to open a school, rather its development and implementation was backed by parents who wanted more options for their children.

While Waterford Montessori Academy is not the only charter school in the area, it is the only school (public or private) providing a Montessori education. Other charter schools in the immediate area include Pontiac Academy for Excellence, Arts and Technology Academy, Jefferson International Academy, Oakside Scholars Charter Academy, Sarah J Webber Media Arts Academy and Great Lakes Academy.

The Elizabeth Lake Road Campus will increase access to high-quality education options to all families in Waterford and surrounding communities to include White Lake, Pontiac, Clarkston, Commerce Township and Union Lake. This application meets the competitive priority for increasing access to high-quality educational choice for all students, including students with disabilities, English language learners, and Native American students. Waterford School District currently serves approximately 9,000 students. Forty-three students are Native American, 5,258 are economically disadvantaged, 1,432 are students with disabilities and 707 are English Language Learners. These are students who could be potentially serviced by Waterford Montessori Academy through its expansion to the Elizabeth Lake Road Campus.

**Competitive Preference Priority 2 - Dual or Concurrent Enrollment Programs and Early College High Schools**

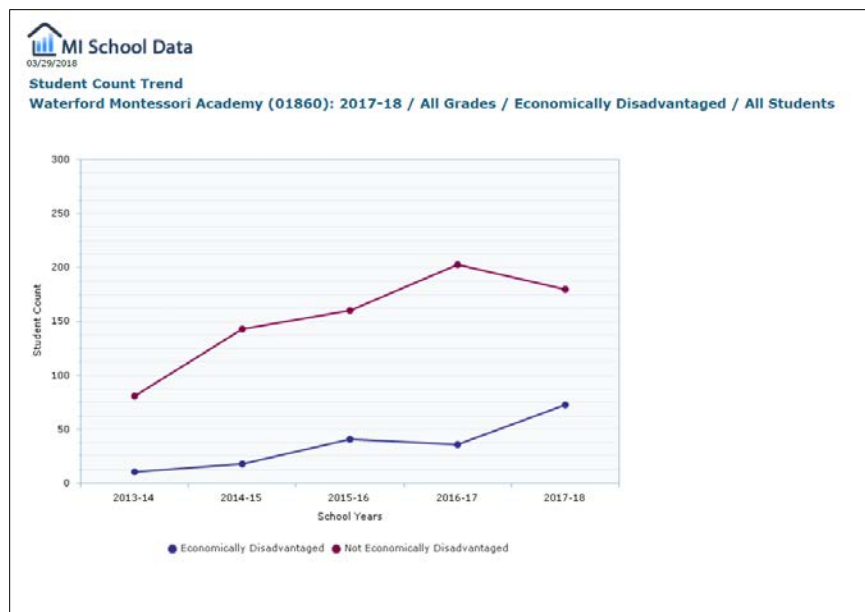
While the educational offerings at Waterford Montessori Academy will only include kindergarten through eighth grade and not include high school offerings, it can be stated that students who exit WMA after successful completion of the elementary and middle school programming will be more prepared to participate in dual enrollment or early college at the high school level. Waterford Kettering High School has a 94% graduation rate and 51% of juniors and seniors participate in advanced coursework, while 74% of students enroll in college after high school. It can be argued, based on the evidence, those students who experience learning in a Montessori classroom from a Montessori trained teacher develop executive functions that allow them to engage in motivated, goal-directed behaviors which are key to success in college and beyond.

### Competitive Preference Priority 3 - Single School Operators

Waterford Montessori Academy currently operates one school located at 4860 Midland Avenue in Waterford, Michigan. This grant application will provide necessary funding to allow the Board of Directors to expand its governance to include a second site at 4350 Elizabeth Lake Road, also in Waterford, Michigan. While WMA's daily operations are contracted to American Montessori Solutions (AMS), a Michigan educational service provider, AMS also only operates WMA. This application therefore meets the competitive priority as a single school operator.

### SELECTION CRITERIA

#### Contribution in Assisting Educationally Disadvantaged Students

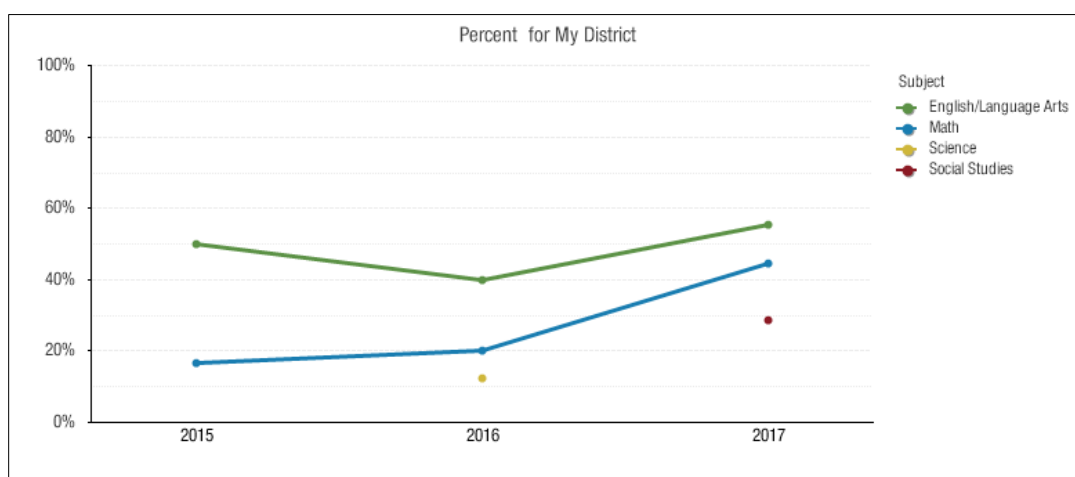


For the 2017/2018 school year, Waterford Montessori Academy served a population of 253 students of which 28.85% were identified as economically disadvantaged. This percentage of

economically disadvantaged students served by the Academy increased from 15% in the 2016/2017 school year. The steady increase in the disadvantaged student population is demonstrated in the chart below. This increase was likely driven by the increased number of disadvantaged students across the State which rose to 50.74% during the current year. The Waterford School District serves a high percentage of economically disadvantaged students

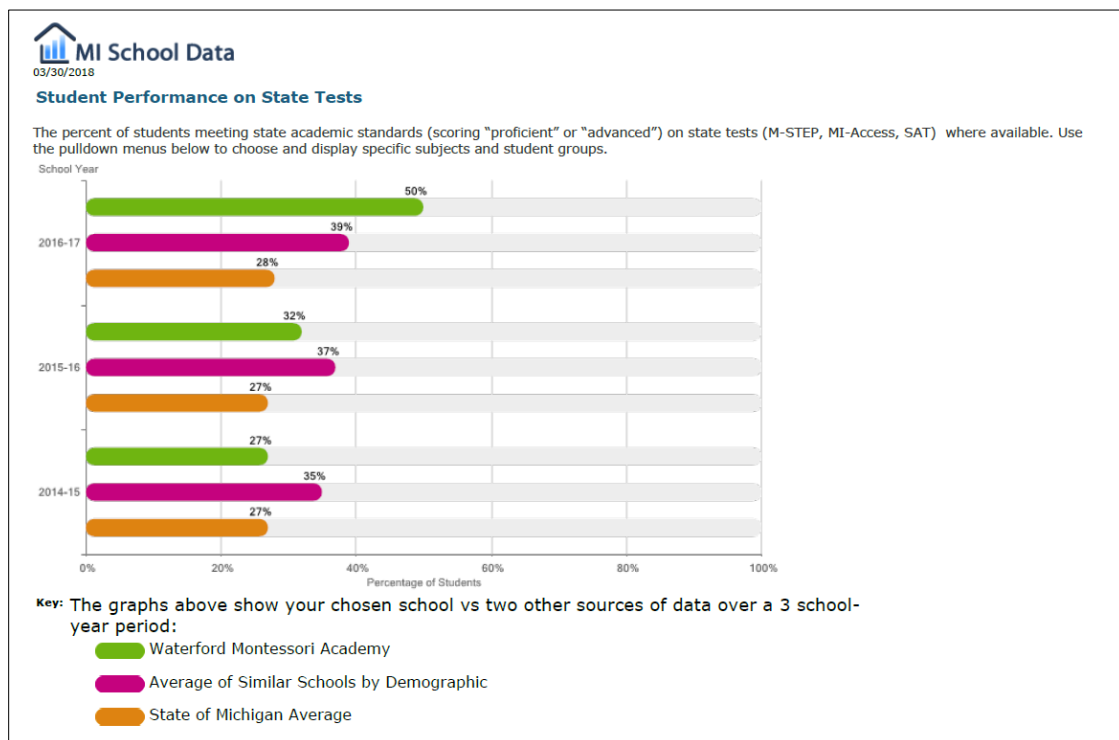
(58%) exceeding the state average. It is expected that the new location will allow more economically disadvantaged students to take advantage of the Academy's Montessori programming. Both campuses will continue to reach out to the community and enroll a diverse population of students, specifically those from economically disadvantaged homes.

More importantly, the proficiency trend for economically disadvantaged students attending Waterford Montessori Academy has increased over the past three years using the state mandated assessment program (MStep) demonstrating the positive Montessori program impact on student achievement. Montessori recognizes that since children are so different, it is unrealistic to expect that they will learn at the same rate. In the Montessori classroom, learning is reinforced internally through the child's own repetition of an activity and internal feelings of success, and children do not move on to the next skill until they have mastered the present one. Individual and group instruction adapts to students' learning styles and developmental levels, and the multi-grade age span in the Montessori classroom encourages the children to teach, collaborate and help each other. Montessori-educated children are instilled with a lifelong love of learning that prepares them and helps to ensure their future success.



Montessori education provides developmentally appropriate education for all students – which is an unmet need in all communities, including the Waterford School District.

The overall performance of economically disadvantaged students at Waterford Montessori Academy in comparison to the state average and identified peer districts is represented in the following chart.



## Quality of the Project Design

Academic achievement, fiscal stewardship and overall compliance are the keys to evaluating the overall performance of charter schools and academic performance is heavily weighted when an authorizer is considering the reauthorization of the academy. The Charter Contract between Waterford Montessori Academy and Saginaw Valley State University provides very clear educational goals and measures. As stated in the Charter Contract, the educational goals of Waterford Montessori Academy include:

**Standard 1:** The Academy shall, at a minimum, demonstrate to the Authorizer that its students are making sufficient progress to meet state-identified proficiency targets in each tested content area and grade level.



Standard 2: The Academy shall outperform host district/comparable district on the state-identified proficiency test.

Standard 3: Using a recognized norm-referenced test, the Academy shall demonstrate that:

- students' fall-to-spring growth demonstrates measurable progress toward grade level targets (closing the gap—bringing students closer to grade level); and
- students' median fall-to-spring Student Conditional Growth Percentile (SCGP) will be at the fiftieth percentile or higher (compares like students, with similar scores – not grade specific).

Standard 4: Using a recognized norm-referenced test, the Academy shall demonstrate that:

- students will achieve scores equal to or greater than the grade level reading and math College/Career Readiness (CCR) target; and
- the percent of students meeting their projected score will average 80% (1 year's growth in 1 year's time).

### **Goals, Objectives and Outcomes**

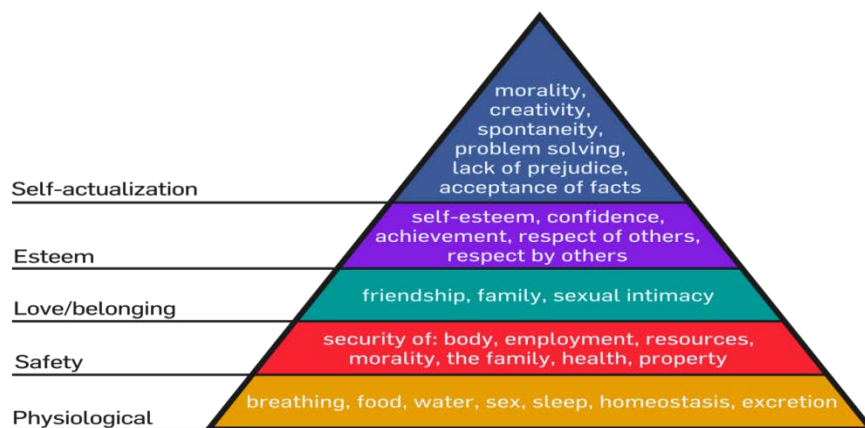
The goals of this project are specifically designed to support the Standards as listed above while providing the Academy with some of the necessary resources to both expand and replicate the existing program to an additional site at 4350 Elizabeth Lake Road. So, while the primary goal is to promote and advance student achievement for all students including all subgroups (Economically disadvantaged, special education, English Language Learners), the four objectives that have been identified are designed to ensure that the Elizabeth Lake Road location is 1) fully equipped with necessary Montessori supplies and materials, 2) houses a state-of-the-art computer lab for participation in the state assessment program, and 3) is staffed by teachers who have been adequately trained in Montessori methodology and communicate student progress and achievement to 4) engaged parents and the Waterford Township community at-large. The specific goals, objectives and outcomes with specific measures are described in greater detail in the table on the following page:

<b>Goal</b>	<b>Objective</b>	<b>Expected Outcome</b>	<b>Measurement</b>	<b>Completion Date</b>
Expand and Replicate Waterford Montessori Academy (Midland) to Elizabeth Lake Road	Offer grades K-8 by Fall 2020 beginning with K-3 and 6-8 in 2018; K-4 and 6-8 in 2019 and K-8 by 2020.	141 students enrolled at Elizabeth Lake Road in 2018 and 252 students by 2020.	Enrollment, MSDS submission	Continued growth through 2023.
	Fully equip 10-12 classrooms	Furniture and Montessori equipment purchased and installed	Purchase orders, invoices, checks, inventory	September 2019
	Equip and install computer lab with workstations for 30 students	Fully functional computer lab with internet access, appropriate student gateway controls, teacher monitoring software and assessment software.	Purchase orders, invoices, checks, inventory	December 2018
	10-12 teachers engaged in year-long Montessori training through American Montessori Center	Montessori certified teachers	Registrations, certifications	September 2019
	100% Parent Involvement and Engagement	Parent Resource Center at Elizabeth Lake Road with computers, internet access, Montessori resources, and regular workshops	Purchase orders, invoices, checks, inventory, parent workshop schedule, sign-in sheets and agendas	September 2019

## Appropriateness to Target Population

All children must master certain skills to continue in their education, advance to college and eventually the workforce. Mastery of these skills is also important for positive social and civic development. Long-term English language learners need to learn to read, write and understand their native language in addition to acquiring proficiency in English. The Montessori curriculum and instructional philosophy accommodates children of all learning styles, teaching them *how* to learn instead of just *what* to learn. Montessori recognizes that since children are so different, it is unrealistic to expect that they will learn at the same rate. The skills that are necessary for a strong education are listed below;

- Fluency in speaking, reading and writing in English language,
- Life-long understanding and love of the sciences,
- Fundamental academic skills such as reading, writing and arithmetic;
- Self-awareness, such as knowing how to go about learning;
- Ability to consciously plan, coordinate, and self-evaluate progress, and then modify plans, based on this self-evaluation, and
- Self-reflection and understanding that others may have different points of view.



However, prior to the mastery of these skills, basic needs of children must be addressed and met. Maslow's hierarchy of needs tells us that children's physiological

and safety needs must be met and they must feel a sense of love and belonging before self-actualization and advanced learning can be achieved.

The understanding of these developmental needs provides the rationale for appropriate grade level configurations, the selection of curriculum, and the choice of effective methodologies. Dr. Montessori found that although young children passed through universal stages of development; they entered and exited ‘sensitive periods’ at different times. These blocks of time last only until a necessary need is fulfilled and then it passes. Montessori felt that “traditional” education, in which children are asked to complete tasks at the same time, missed the opportunity and responsibility to respond to these ‘sensitive periods’ as a heightened time to have deep, meaningful learning experiences. Unlike “traditional” schools, children in Montessori are allowed freedom of movement and freedom of choice. Montessori classrooms are prepared environments in which children follow their individual developmental path. The Montessori teacher is a trained observer that is ready to recognize and respond to each child’s developmental needs. Materials in the classroom are unique to the Montessori Method as is the beginning of the spiral of education that each child will follow, experiencing concepts through various senses and discovering concepts through touch and manipulation.

Salazar (2013) reported that “the Montessori Method of teaching facilitates self-paced learning that promotes a child’s independence and encourages decision-making which are instrumental in becoming successful learners.”

### **Quality of Project Personnel**

Waterford Montessori Academy is governed by a highly qualified five member Board of Directors appointed by Saginaw Valley State University. Pursuant to its independent authority, the Board of Directors of Waterford Montessori Academy has contracted the day-to-day operations of the Academy to American Montessori Solutions (AMS), an organization founded to provide curriculum, financial, and management services exclusively to public Montessori

charter schools. AMS employs a core staff that boasts a rich history, and extensive and varied experience in the Montessori educational field.

The AMS team has a decades-long history of working with, administering, consulting, or managing private and public school programs, including Traverse City Area Public Schools Montessori, Brookfield Academy, UAW-Ford Center, Auburn Hills Avondale Montessori, Mt. Clemens Montessori Academy, Silver Lake Montessori School, American Montessori Academy, Detroit Diesel-UAW Montessori, Beverly Hills Academy and the Saginaw Chippewa Indian Tribe (Binoojiinh Montessori), to name a few. Members of the organization have also provided specialized educational services to schools, including: curriculum development, support, implementation, and assessment; specialized training and support for teachers and other staff; professional development in-services and parent education seminars; development of written policies to meet and comply with state requirements; development of daily routines, record keeping, and staff scheduling; classroom layout and design; and school and program evaluations. There is nothing related to the development, operation, or management of public school academies with which AMS is not familiar. The knowledge and expertise of each core staff will be instrumental to the ongoing success of Waterford Montessori Academy.

The School Director Theo Papatheodoropoulos, as chief administrator of the school, will work with a 12-month contract. He or she will be responsible for overall leadership within the school. The Director will organize, supervise, and evaluate the development of the curriculum, school programs, staff and student achievement while simultaneously overseeing day-to-day operations of the school. Mr. Papatheodoropoulos has a 40-year career in education. His resume is included as an attachment.

It will be incumbent upon the School Director to communicate the vision, philosophy and mission to the staff, students, parents, and the community. Responsibilities for this position include development and administration of educational and community components of the school alongside recommendations to the board for school budget purposes. In addition, the School Director is responsible for daily implementation of federal and state education and reporting requirements. An effective school leader with Montessori knowledge and training is necessary to steer the success of the school.

The Project Director Jeremy Gilliam has vast experience in charter school management and operations. He will ensure timely completion of all tasks as outlined in this grant application in accordance with federal guidelines as noted in the Code of Federal Regulations and the Every Student Succeeds Act. His resume is also included as an attachment.

#### **Employment of Personnel from Underrepresented Groups**

Waterford Montessori Academy has currently identified four teachers for the Elizabeth Lake Road expansion/replication. Three (75%) of the identified teachers are female with one (25%) male. One (25%) teacher is African American while the remainder (75%) is white. Two of the teachers (50%) are over the age of fifty. While more teachers will be hired, Waterford Montessori Academy strives for diversity and encourages applications from groups that have been traditionally underrepresented.

#### **Training and Experience of Key Personnel**

Mr. Theo Papatheodoropoulos, School Director, has a Bachelor Degree from Oakland University and Montessori credentials from the Michigan Montessori Teacher Center. He served as a teacher and administrator from 1977 to 1985 at which time he transitioned to the President/Director of Brookfield Academy where he served for ten years. Since 1995 he has

served as the President of both the American Montessori Center and American Montessori Solutions.

Mr. Jeremy Gilliam earned his Bachelor Degree from Michigan State University, a Master of Public Administration Degree from Western Michigan University and is pursuing an advanced degree in Educational Leadership from Eastern Michigan University. Mr. Gilliam has served as the Superintendent at a Michigan charter school prior to his employment with Waterford Montessori Academy. He also has extensive experience as a Charter Contract Administrator working for Central Michigan University in their Charter Schools Office. He has also worked as a legislative aide in the Michigan House of Representatives.

All teachers at Waterford Montessori Academy must possess proper Michigan certification, undergo a criminal background check and unprofessional conduct check and if not certified in Montessori be willing to participate in Montessori training.

### **Quality of the Management Plan**

The primary goal is to expand and replicate the existing Montessori program offered at 4860 Midland Avenue in Waterford with an additional location at 4350 Elizabeth Lake Road, Waterford. The Elizabeth Lake Road site is currently under development and is slated to open in the fall of 2018 with 141 students in kindergarten through grade three, along with middle school offerings of grades six through eight. A Certificate of Occupancy for the facility is targeted for on or about August 15, 2018. The renovations will be completed pursuant to architectural plans under development. It is known that the scope of work will include the installation of full fire suppression and alarm systems; improved water service; electrical system upgrades; interior carpentry; replacement flooring; replacement of interior and exterior doors; reconstruction to meet the Americans with Disabilities Act and ensure proper access regardless of disability; drop

ceilings; and replacement of the HVAC system. Building renovations are not a part of this grant application and will be completed through secured lending authorized by the Board of Directors of the Academy and in compliance with regulations set forth by the Michigan Treasury Department. Waterford Montessori Academy is in its fifth year of operations as a Michigan public school academy authorized by Saginaw Valley State University. As of June 30, 2017, the Academy had established a positive net position of \$670,749 increased \$49,298 from the prior 2016 fiscal year. The 2017/2018 annual budget anticipates \$2,245,276 in general fund revenues.

Funds received pursuant to the Charter School Grant Program 84.282E will be used to 1) equip classrooms, 2) install a computer lab for assessment, 3) provide professional development to teachers and 4) engage parents in their children's education. Oversight of these activities will be conducted by the governing Board of Directors while day-to-day responsibility for the completion of all tasks will be delegated to Theo Papatheodoropoulos, Chief Administrator for the school and Jeremy Gilliam, Project Manager. Both individuals have vast experience with projects of this magnitude. Mr. Papatheodoropoulos was principally responsible for the start-up of the Midland location. The Midland location also needed renovations prior to opening to ensure compliance with Michigan's school building code. All renovations were completed on time and school opened as originally scheduled.

The timeline for this grant application is October 1, 2018 through September 30, 2019. The Project Director and School Director (Chief Administrator) will work closely with vendors to ensure the procurement of allowable supplies and services within the award period. It is anticipated that some of the supplies may be on loan to the school prior to the ability to finalize their purchase. This will serve to benefit the program by allowing teachers the opportunity to



ensure adequacy and quality of each purchase. The table follows depicts the anticipated timeline for each activity.

<b>Objective</b>	<b>Responsibility</b>	<b>Activities</b>	<b>Beginning Date</b>	<b>Completion Date</b>	<b>Check Points</b>
Offer grades K-8 by Fall 2020 beginning with K-3 and 6-8 in 2018; K-4 and 6-8 in 2019 and K-8 by 2020.	Theo Papatheodoropoulos and Office Staff	Open Enrollment Window Legal Notice of Enrollment Lottery Date if Needed Acceptance Letters to Parents Completion of Enrollment Documents Input of records into Student Information System Review of records for Special Needs Welcome Letters to Parents		Initial Continued growth through 2023.	Updated at each monthly board meeting
Fully equip 10-12 classrooms	Theo Papatheodoropoulos and Jeremy Gilliam	Order basic furniture – tables chairs shelving units white boards Order Montessori supplies for each core content area	October 1, 2018	September 30, 2019	Updated at each monthly board meeting
Equip and install	Theo Papatheodoropoulos	Order computers	October 1, 2018	December 2018	Updated at each

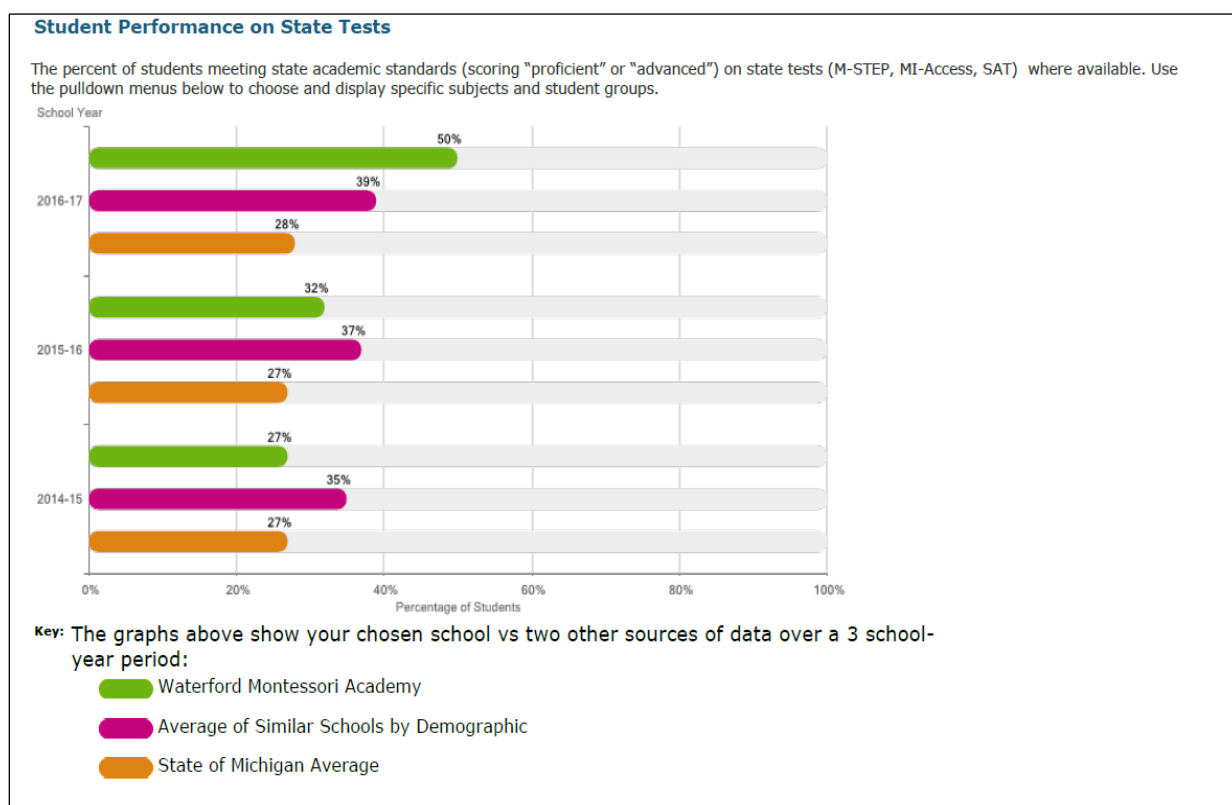
computer lab with workstations for 30 students	and Jeremy Gilliam	and peripherals Order workstations Ensure internet connectivity Order and install firewall software Order and install assessment programs			monthly board meeting
10-12 teachers engaged in year-long Montessori training through American Montessori Center	Montessori certified teachers	Engage teachers in year-long professional development through American Montessori Center	October 1, 2018	September 2019	Updated at each monthly board meeting
100% Parent Involvement and Engagement	Theo Papatheodoropoulos and Jeremy Gilliam	Equip and open a Parent Resource Center and offer regular parent workshops to educate parents on “Supporting School Success”	October 1, 2018	September 2019	Updated at each monthly board meeting

### Quality of the Eligible Applicant

Waterford Montessori Academy is an established Michigan public charter school authorized by Saginaw Valley State University. The original charter contract issued in 2013 for

a three-year period ending June 30, 2016 was extended for an additional two-year period through June 30, 2018. An additional renewal is forthcoming and a five-year term is expected.

The applicant has demonstrated that it is a high-quality charter school and is making positive strides toward impacting both student achievement and growth for all students and subgroups that include economically disadvantaged students and students with disabilities. The following chart ([www.mischooldata.org/EssaDashboard/EssaDashboardPerformance.aspx](http://www.mischooldata.org/EssaDashboard/EssaDashboardPerformance.aspx)) compares the proficiency of economically disadvantaged students at Waterford Montessori Academy as compared to the State:



No schools operated by Waterford Montessori Academy have been closed.

The Board of Directors of Waterford Montessori Academy meets on a monthly basis at the Academy with all meetings held in accordance with the Open Meetings Act. The Board of Directors has a governance role and acts to ensure that 1) the students are learning, 2) the

finances are managed in accordance with governmental accounting principles, and 3) the Academy is in full compliance with its Charter Contract, applicable state statutes and applicable federal regulations. The annual audit by an independent certified public accounting firm attests to the financial stability of the Academy. The Academy Board of Directors has approved this application and is well qualified to oversee the fiscal control and appropriate accounting procedures.

### **Continuation Plan**

While this grant will certainly assist the school with its plan to replicate and expand the current Montessori program, Waterford Montessori Academy will be able to sustain the educational program beyond the receipt of these federal funds. Michigan currently provides a state aid foundation allowance for each student that attends the Academy. That annual amount is currently \$7,631 per student. In addition, the Academy applies for and utilizes various Title programs pursuant to a Consolidated Application that is filed with the State of Michigan MEGS+ system on an annual basis. 80% of the Academy's annual funding comes from the State and the Academy is able to adequately operate the instructional programs based on this revenue. It is anticipated that the Academy will receive between \$5,103,716 and \$5,503,220 each year over the next five years with the addition of the Elizabeth Lake Road campus. Anticipated revenues and expenditures for the next five years are summarized in the table on the following page:

	<b>2018/2019</b>	<b>2019/2020</b>	<b>2020/2021</b>	<b>2021/2022</b>	<b>2022/2023</b>
<b>Revenues</b>	\$5,103,716	\$4,641,495	\$5,503,220	\$4,740,525	\$5,086,183
<b>Expenditures</b>	\$4,899,515	\$4,390,763	\$5,079,347	\$4,347,816	\$4,570,779
<b>Revenues over Expenditures</b>	\$204,200	\$250,733	\$423,874	\$392,709	\$515,404
<b>Beginning Fund Equity</b>	\$310,000	\$514,201	\$764,933	\$1,188,807	\$1,581,516
<b>Ending Fund Equity</b>	\$514,201	\$764,933	\$1,188,807	\$1,581,516	\$2,096,920

## **APPLICATION REQUIREMENTS**

### **Roles and Responsibilities**

The American Montessori Solutions team (Theo Papatheodoropoulos, Brenda Anderson, Shawn Gasiorowski, and Carey Wendell) under contract with the academy school board and its governance will oversee the specific steps and actions needed to undertake the expansion project. The team members, through their extensive backgrounds as Montessori teachers, trainers and administrators, will lend their expertise to the Academy in the areas of procurement of age-appropriate Montessori materials, administration and classroom instruction.

Individual team members will bring their extensive experience to the Academy in a variety of areas, including: all facets of Montessori education and school administration (AMS team), marketing and community outreach (LuAnn Birchmeier), finance and personnel issues (Patrick Carraher), and work with non-profit organizations and grant writing (Gregory Matzelle).

A number of the development team members (Shawn Gasiorowski/Theo Papatheodoropoulos/Jeremy Gilliam) have served as school administrators. In that capacity, they have demonstrated strong leadership, organizational skills, and business and financial management expertise.

Several members (Carey Wendell / Theo Papatheodoropoulos / Brenda Anderson) have developed, implemented and supported academic programs and Montessori curriculum, and have correlated the Montessori curriculum to meet with Michigan Curriculum Frameworks.

In addition, two development team members will be instrumental in oversight of the federal grant funds. One (Greg Matzelle), with his experience in administering non-profits, and the second (Patrick Carraher), with his strong business and financial background.

Administration of school staff will be subject to requirements determined appropriate by the Board of Directors, in compliance with federal, state and local laws. Waterford Montessori Academy school director will be responsible for daily management of school operations and oversight of all school staff and their designated responsibilities within the management structure.

The chain of command starts at the Michigan Department of Education →Authorizer →Board of Directors →Management Company →School Director →School Staff.



The Board of Directors is further supported by an attorney (G. Michael Meihn), and an auditing firm (Taylor & Morgan, PC). These support services are contracted for on an independent contractor agreement and are arms-length agreements between each service provider and the Board of Directors.

The Board of Directors of Waterford Montessori Academy also contracts with American Montessori Solutions as the educational service provider, also referred to as a management company. American Montessori Solutions (AMS) is an organization founded to provide curriculum, financial, and management services exclusively to public Montessori charter schools. AMS employs a core staff that boasts a rich history, and extensive and varied experience in the Montessori educational field. AMS may contract with Education Management & Networks (EMAN) to provide grant management and reporting. Founded in 2003, EMAN has extensive experience in grants management having assisted approximately twenty different

development teams in the effective utilization of CSP funding through the SEA (State Education Agency) in the development of Michigan charter schools.

### **Quality Controls**

While Waterford Montessori Academy is established as a body corporate and a governmental entity with all the rights and authority to operate independently, additional oversight and quality control is provided by Saginaw Valley State University (“University Board”). This is pursuant to the Charter Contract and Fiscal Agreement which states, “The University Board has the responsibility to oversee the Academy’s compliance with the Contract and all Applicable Law.” The Contract may be revoked by the University Board if the Academy fails to meet its stated educational goals, fails to demonstrate fiscal stewardship, has insufficient enrollment, and/or acts in any way that is inconsistent with the terms and conditions of the Charter. The Charter Contract is solely between Saginaw Valley State University and the Board of Directors of Waterford Montessori Academy. The Academy then contracts with various service providers to ensure the effective and efficient day-to-day operations of the Academy in the furtherance of the educational program and the advancement of student achievement. Academy growth and demonstrated proficiency are measured by the mandated Michigan assessment program (MSTEP) and NWEA’s Measures of Academic Progress. Data from these assessments are used to evaluate the Academy’s success in meeting the prescribed educational goals set forth in the Charter Contract. Based on student achievement, fiscal stability and compliance with mandated reporting, Waterford Montessori Academy had its contract extended in 2016 and expects reauthorization prior to the expiration of the current contract in June 2018.

The Board of Directors of Waterford Montessori Academy has adopted a set of fiscal policies and procedures in order to ensure that all accounting and reporting conforms not only to

GAAP (Generally Accepted Accounting Principles) but also adheres to the regulations detailed in EDGAR (Education Department General Administrative Regulations. The policies provide guidance for the accounting records to be maintained including the general ledger, cash receipts ledger, disbursements and property. Accounting records are properly maintained and reported monthly to the Board to provide adequate financial control of its assets and liabilities and to account for project costs. Waterford Montessori Academy has established an internal controls procedure regarding purchasing, invoices and purchase order processes. In addition, the fiscal policies prohibit conflicts of interest.

### **Parent and Community Input**

Waterford Montessori Academy was initially organized by a group of Waterford residents who remain passionate about and knowledgeable of Montessori education. Many of them are parents of former students at Laurel Montessori School, the first Montessori school in Michigan, which opened in 1964 and closed in 2011 as a result of the faltering economy and fewer families being able to afford the tuition. Laurel Montessori eventually became one of four campuses of Brookfield Academy, a private school with a long history of innovation and considerable academic success, and its closure displaced a substantial number of students and families who desire a Montessori education, and are motivated to do whatever is necessary to support the school.

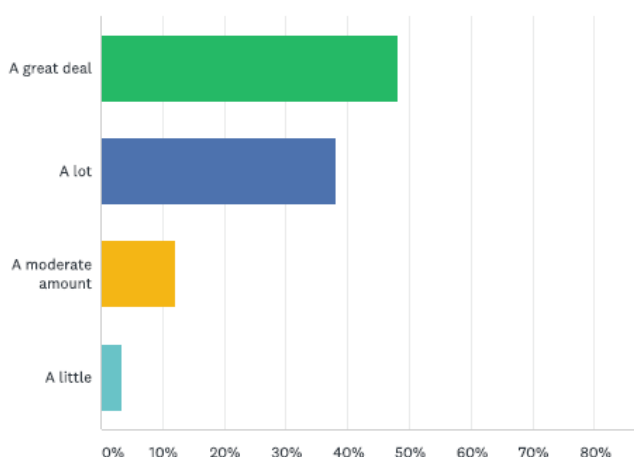
The Academy's supporters are committed to inclusivity and believe that successful community schools must seek out and consider the informed opinions of stakeholders. This is a philosophy that governs WMA in its founding and operations. With respect to planning, the Academy initially formed a parent advisory group separate from, but linked to, the Board of Directors, to provide input on school design, organization, programming and policies. This



informal group held regular meetings for enrolled families and others in the community who expressed interest in the school and its operations.

Without compromising the inclusive community philosophy, the Board of Directors firmly believe that the core function of schools – teaching and learning – should be run by qualified, professional educators. With that said, there are a myriad of opportunities for parents and supporters to participate in the school about substantive matters on an ongoing basis. First and foremost, parents are welcome to attend Board meetings and encouraged to do so. The Board of Directors strives to hear parent and student views on the school's operations and programs. In addition, the parent advisory committee supports the school, collects and communicates the views of parents to the school administration and board, and serves as a sounding and advisory board to same.

Answered: 92 Skipped: 0



Parents and community members have an important role to play in program and school evaluation as well. One or more parent representatives are always part of the school improvement team, and the aforementioned parent advisory group provides consistent feedback throughout the school year. The Academy embraces

the practice of end-of-year reflection and engages in self-evaluation, modifying the course as necessary. In a recent survey, 100% of parents indicated that the Academy was successful in helping each child reach his/her full potential.

### **Planned Activities**

The primary goal of this grant application is to provide supplemental funding for the expansion and replication of the existing Montessori program offered at 4860 Midland Road to a second facility at 4350 Elizabeth Lake Road (ELR). While initial grade offerings at ELR will expand the current Academy program to include eighth grade, it will also replicate and duplicate the kindergarten through grade 3 offerings in the inaugural year of 2018/2019. The ELR site will then continue to expand each year thereafter until a full K-8 program is available to Waterford Township (and surrounding areas). Specific activities will include 1) equipping the ELR classrooms with appropriate furniture and Montessori supplies, 2) equipping a state-of-the-art computer lab for the Academy's assessment program, 3) providing quality Montessori training to all teachers, and 4) engaging parents through the creation of a parent resource room and the regular offerings of appropriate parent workshops. The ELR facility will then be sustained in future years primarily through state aid revenues and available federal funding that will include Title I, Title II and IDEA.

### **Expenditure of Funds**

The following table has been prepared to identify the specific use of funds from the Charter School Program 84.282E program. A total of \$286,592 is requested for year one activities. Subsequent funding if available would be used to continue to expand the program at ELR.

<b>Goal</b>	<b>Task</b>	<b>Amount Requested</b>
Outfit ELR Classrooms	Purchase bookshelves from Pfeiffer Custom Furnishings.	
	Purchase curriculum support and leveled reading books from Scholastic to include Stowaway, Johnny Tremain, Island of the Blue Dolphin, Journey to Joburg and various In Their Own Words books along with	

	biographies and Scholastic Trio Complete Sets	
	Purchase language instruction materials from Primary Concepts to include word building kit, short vowel objects, compound words, words that rhyme, size sort and various counting object sets	
	Purchase Montessori based science and language support materials from Montessori Research and Development to include Human Anatomy and the Water Cycle	
	Purchase of classroom furniture for new classrooms to include tables and chairs from School Speciality, IKEA, and ECR4kinds with shipping charges	
	Purchase of Math and Language support materials from Albanesi	
	Purchase of Montessori materials and equipment from American Montessori Center	
	Purchase of science lab supplies and materials from Delta Science	
	Purchase Phonics Readers from EPS	
	Purchase reading comprehension support materials from McGraw Hill to include Barnell Loft materials	
	Purchase science and geography materials from ETC	
	Purchase supplies, books and materials for all curricular areas from Montessori Services	
	Purchase 75 Chromebooks from Netech for classroom use	
	Purchase of 3 laptop charging carts	
Outfit Computer/Assessment Lab	Purchase 30 workstations	
	Purchase 30 desktop computers	
	Purchase 1 document camera	
	Purchase 2 locking file cabinets for secure test storage	
	Purchase of 30 sets of Microsoft Office 365 HM Prem 1	
	Purchase of accommodation software for special needs children – voice recognition, dragon, speakers	
	Purchase of Brother multifunction printer and toner cartridges	

	Purchase of Dell inspiron desktop computer and monitor		
	Purchase iteach mobile cart		
	Purchase of management software		
	Purchase of Smart Board		
	Purchase of stack chairs		
Professional Development	Teacher training in the Montessori philosophy and methodology from the Michigan Montessori Teacher Education Center.		
	Attendance at the 2019 National Charter Schools Conference for Board Members, Administrator, and several teachers (registration fees, lodging, travel, meals)		
	2 day training in Washington DC for Project Director and Grants Manager		
Parent Engagement	Equip and furnish a Parent Resource Center		
	Purchase 5 Dell computers for Parent Resource Room		
	Purchase Brother multifunction printer and toner cartridges for Parent Resource Room		
	Purchase assortment of Montessori informational materials for parents		
	Purchase of Supporting School Success a Families That Care parenting program published by Channing Bete.		
Miscellaneous	Purchase Grants Management from Education Management & Networks - \$95 an hour for approximately 30 hours per month for 12 months plus expenses		
Total Grant Expenditures			

### Financial Sustainability

Waterford Montessori Academy has developed a five-year budget projection based on the combined anticipated enrollment that will be served at both the Midland Avenue and the Elizabeth Lake Road facilities. The current per pupil foundation amount that is provided by the State of Michigan [REDACTED] It is expected that this amount will increase for the 2018/19 school year to [REDACTED] State aid represents 80% of the annual revenues with the balance coming from local and federal revenues. Local revenues include preschool tuition and after-school (latchkey)

revenue. Federal revenues include Title I, Title II and IDEA. Waterford Montessori Academy has also secured long-term funding that will allow the academy to purchase the Elizabeth Lake Road facility and make capital outlay purchases as needed. The five-year budget projection supports the education program and continues to grow the fund equity each year which is projected to exceed Two Million Dollars in 2022/23.

### **Parent, Family and Community Engagement**

Research proves that uninformed parents are often left out of the education process, while consistent parent involvement has a direct positive impact on student achievement. As a result, strategies will be employed by the Academy to promote and encourage parent involvement.

These strategies will include at a minimum:

- Written information in an understandable way.
- A variety of ways to communicate with teachers.
- Parent training about special education issues.
- Information that offers support to parents of students with disabilities.
- Encouragement to parent(s) to participate in the decision making process.
- A Parent Resource Center with Computer Access
- Various Parent Workshops

Joyce Epstein has defined the parent's role in education to include parenting, communicating, volunteering, learning at home, decision making, and collaboration:

- Parenting - Fulfilling a leadership role within the family, community, and within the child's school. Developing skills as a parent, understanding child and adolescent development, and setting home conditions that support the child at each age and grade level, to have a more positive impact on the child's achievement;

- Communicating - Parents have a responsibility to communicate with the child, the community, and the school. The specific attributes of the child should be communicated to include information about learning style, things that motivate him/her, and family culture, medical history and experiences. Without this information, it is impossible to educate the whole child. Concerns as a parent, should be communicated to help the team develop goals that are in line with expectations. Talking to your child about this education plan and underlining the importance of self-advocacy will help the child develop an understanding of his/her own needs.
- Volunteering – Volunteering, as a parent, demonstrates a commitment to improvement. Being prepared to work with the school to improve recruitment, training, work, and schedules will help the school to involve families and community members as volunteers at the school and in other locations to support the students and the school programs.
- Learning at Home – Parents should be involved with their children in learning activities at home. Those activities include homework and other curriculum-linked activities and decisions. Asking questions about the expectations for each grade and the curriculum will the most of everyday learning opportunities. Sharing strategies that support children’s learning at home and in the community with teachers, families, and community members will demonstrate how education is valued.
- Decision Making – Parents who maximize their own learning potential through training take a more active role in the school and community PTA/PTO, school councils, committees, and other parent organizations.

- Collaboration – Parents can help the school build their knowledge of the resources for families, students, and the school with businesses, agencies, and other groups that provide services to the community. These connections help shape the community.

Waterford Montessori Academy has three well attended curriculum nights at each level of instruction – early elementary (Pre-K to K), lower elementary (grades 1-3), upper elementary (grades 4 and 5), and middle school (grades 6-8). Parents have multiple opportunities to volunteer at the Academy including serving in the cafeteria, guest reading, and leadership for various science Olympiad teams. In addition, there are eight to ten evening and weekend school family events to attend (fun run, roller-skating, zap zone, picnic, talent show, etc.). The Academy has an Open Door Policy for access to the School Director and all parents have his cell phone number. Parents transport their children, dropping them off in the mornings and picking them up in the afternoon and so there is constant communication in the lobby, car drop off and pick up line.

Funding from this grant will allow the Academy to purchase Channing Bete's "Supporting School Success" program that is part of their "Families That Care®" series of parenting programs. The program provides a complete, research-based program that helps parents of children in Kindergarten through grade 3 learn how to support children's academic achievement. This program includes step-by-step instructions for parent workshops and also includes a leader's guide, a family guide, and kids' kamp guide and visual aids. The program was developed in support of the Every Student Succeeds Act and provides effective ways to improve parent engagement.

### **Transportation of Students**

While parents are expected to transport their children to and from school, transportation will be provided from the Midland Avenue campus to the new Elizabeth Lake Road campus. Carpooling can be arranged between families and is encouraged.

### **Retention of Students**

The excellence and rigor of the Montessori educational program combined with the meaningful relationships that are created between staff and students ensures the retention of students who remain in the service area of the Academy. Re-enrollment strategies begin each year in early March before an open enrollment period held in April. The goal of the Academy Board is to have at least 90% of the students return each subsequent year (this accounts for matriculating students). To promote the retention of students, WMA offers:

- Smaller classes with the focus on the individual student,
- A highly trained and dedicated staff, culturally aware and sensitive to a world view,
- A safe peaceful campus with up-dated facilities,
- The use of current IT technologies,
- The expected involvement of parents or guardians in the school and student's work,
- Extra-curricular activities and,
- A love of learning among all students.

### **Autonomy over Budget and Operations including Personnel**

In 2016, the Gerald R Ford School of Public Policy published a report comparing practices between Michigan's charter schools and the traditional districts. They found that charter schools have significantly more autonomy than traditional districts. This autonomy



extends from building level decision making to curriculum design and staffing, including hiring and firing of instructional personnel.

### Principal Autonomy

In our sample, charter school principals enjoy significantly more decision-making autonomy in the critical areas of curriculum design and staffing than do public school principals, despite having slightly less teaching and administrative experience (15 versus 18 combined years). Forty-five percent of charter schools give their principals and teachers the authority to adapt the curriculum. In contrast, only 16% of public school principals report curriculum decision-making authority; the majority report that curricular decisions are made by district office personnel. This school-level autonomy extends as well to teacher hiring, where 83% of charter school principals make final teacher hiring selections, while only 53% of public school principals do the same. Further, only 30% of charter school principals identify difficulty in firing low-quality teachers as a factor preventing school improvement, while 79% of public school principals report such challenges.

In spite of this autonomy, Michigan charter schools are still held to a high level of accountability. As a Michigan public school academy, the Board of Directors' primary responsibility is governance of the school. The Board as such is responsible for overall effectiveness of the Academy's operations to include student achievement, fiscal stewardship, policy establishment, organizational planning and adequate resources. Charter School board members

have a Duty of Care, a Duty of Loyalty and a Duty of Obedience. It is ultimately the Board's responsibility to ensure that the Academy is "effective in achieving its mission and efficient in using its resources" (The Center for Charter Schools, 2010).

The Board is required by Michigan Statute to adopt an annual budget that complies with the Uniform Budget and Accounting Act. The Board is further required to follow the Michigan School Accounting Manual and public sector accounting principles to include MDE's prescribed chart of accounts. The state of Michigan prohibits schools from adopting deficit budgets. The Board of Directors reviews financial information for the Academy at its regular board meetings to include a statement of revenues and expenditures and a balance sheet for the General Fund and

any special revenue funds. Overseeing the school's finances is one of the core responsibilities of the Board of Directors.

### **Admissions Policies and Procedures**

The Academy will provide legal notice or advertisement of the application and enrollment process in a local newspaper of general circulation. The legal notice or advertisement will include the process and/or location(s) for requesting and submitting applications, the beginning date and the ending date of the application period, and the date, time, and place the random selection drawing(s) will be held, if needed. The legal notice or advertisement of the application period shall be designed to inform individuals that are most likely to be interested in attending the Academy. The Academy, being an equal opportunity educational institution, shall be committed to good-faith affirmative action efforts to seek out, create and serve a diverse student body. The Academy will advertise through direct mail and other means to persons most likely to be interested in the Academy (to include students with disabilities, Native American students and English language learners), within a defined radius of the school.

Additionally word of mouth and neighborhood canvassing may be employed. The Montessori reputation and the actions of the development team and the concerned citizens will help with student recruitment.

There is an open enrollment policy at WMA. Every student regardless of race, culture, physical or mental limitations, residential status or previous grades will be welcome on a first come first enrolled basis. For those classes that reach their size limits a lottery will be held shortly after the close of enrollment. Waiting lists will be employed after that.

*Priority for enrollment will be given to current students and their siblings. This is the only exception allowed by law.*

Waterford Montessori Academy shall neither charge tuition nor discriminate in pupil admissions policies or practices on the basis of intellectual or athletic ability, measures of achievement or aptitude, status as a handicapped person, or any other basis that would be illegal if used by a Michigan public school district.

- Academy enrollment shall be open to all individuals who reside in Michigan. Except for a foreign exchange student who is not a United States citizen, a public school academy shall not enroll a pupil who is not a Michigan resident.
- Academy admissions may be limited to pupils within a particular age range/grade level or on any other basis that would be legal if used by a Michigan public school district.
- The Academy Board shall establish a policy providing enrollment priority to siblings of currently enrolled pupils. However, the Academy may not provide a preference to children of Board members or Academy employees.
- The Academy shall allow any pupil who was enrolled in the immediately preceding academic year to re-enroll in the appropriate age range/grade level unless that grade is not offered.
- No student may be denied participation in the application process due to lack of student records.
- If the Academy receives more applications for enrollment than there are spaces available, pupils shall be selected for enrollment through a random selection drawing.
- The application period shall be a minimum of two weeks in duration, with evening and/or weekend times available.

- The Academy shall accept applications throughout the year. If openings occur during the academic year, students shall be enrolled. If openings do not exist, applicants shall be placed on the official waiting list.
- The waiting list shall cease to exist at the beginning of the next application period.
- In the event there are openings in the class for which students have applied, students shall be admitted according to the official waiting list. The position on the waiting list shall be determined by the random selection drawing. If there is no waiting list, students shall be admitted on a first-come, first-served basis.
- The Academy may neither close the application period nor hold a random selection drawing for unauthorized grades prior to receipt of written approval from the authorizer.

### **Students with Disabilities**

Waterford Montessori Academy follows all state and federal rules, regulations, and guidelines related to the delivery of special education. Special Education services include timely IEPs, classroom interventions, and appropriate placement in the least restrictive environment. WMA contracts for services from a licensed school psychologist to lead the child find process and identify students who are eligible for special education services in compliance with the federal Individuals with Disabilities Education Act (IDEA). A full-time school social worker is contracted as needed to assist students and teachers with potential behavioral concerns. The Academy provides a resource room and full-time special education room(s) as needed to meet the needs of its students. Where considered necessary, additional services are provided. These ancillary special education services may include speech therapy, physical therapy, and occupational therapy as mandated in any child's IEP. These services are contracted through

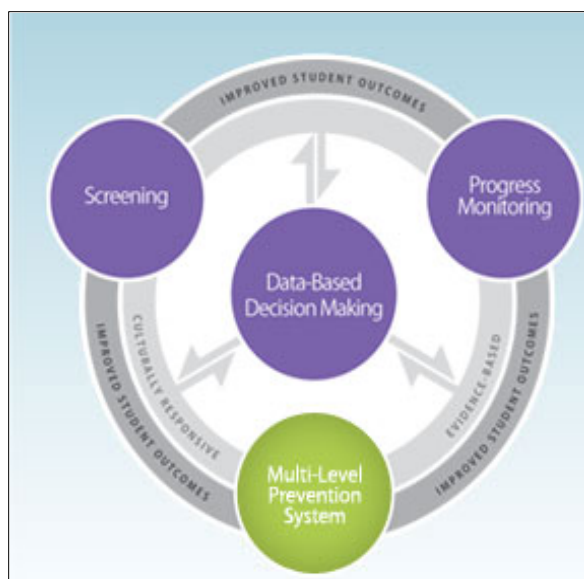
reliable, experienced service providers. Special education staff participate in professional development offered not only by the Academy but by the local Intermediate School District.

Furthermore, Waterford Montessori Academy actively participates in the Oakland County Intermediate School District specific special education plan, complying with service quotas and case load requirements with flow-through funding earmarked for providing greater service to the students identified. A special education coordinator provides regular reporting to OISD and participates in all activities sponsored by the ISD. Efforts are coordinated to ensure the smooth and seamless delivery of services. “The Oakland Schools Department of Special Education provides staff and services to the constituent school districts within Oakland County to support the identification and education of students with disabilities. Services include, but are not limited to, teacher consultants for evaluating and instructing students with low incidence disabilities, audiology evaluations regulatory technical assistance, access to assistive technology and a range of professional learning opportunities for educators, parents, and administration” (<http://www.oakland.k12.mi.us/Departments/SpecialEducation/tabid/241/Default.aspx>). In recognition of the diverse needs of students, Oakland County provides the opportunity for its districts to operate special education programs and services according to IDEA.

In accordance with IDEA, Waterford Montessori Academy follows a model of inclusion whenever possible, and for as long as possible, so that all students attend the same classes. The model of inclusion, when appropriate, ensures that student learning occurs in the least restrictive environment.

Regular and consistent administrative tracking of student behavioral issues help to identify potential learning difficulties before they become disabilities. Interventions (detentions, in-school suspension, enticements, problem recognition, self-monitoring, solution generation,

visualization, relaxation techniques, reinforcement, academic modifications, physical structuring, etc.) are employed in the general education classrooms to support all students learning and prevent unwarranted identifications for special education services when other alternatives are possible. There are limited out of school suspensions. When a student is not in class they are probably not learning. The use of peer counseling, parent education and assistance, a dedicated counselor, and in-school detention rooms may be employed to help problem students maintain academic continuity.



Staff is trained in the Response to Intervention (RtI) approach to assist all students who may demonstrate learning difficulties prior to formal identification for special education. Rigorous implementation includes a combination of high quality, culturally and linguistically responsive instruction; assessment, and evidenced-based interventions.

Comprehensive RTI implementation contributes to more meaningful identification of learning and behavioral problems, improve instructional quality, provide all students with the best opportunities to succeed in school, and assist with the identification of learning and other disabilities. Students who have been identified for special education receive required services and education supports in addition to regular assessments.

## **A Defined Charter School**

Waterford Montessori Academy has been established as a Michigan public school academy in accordance with Michigan’s Revised School Code Part 6a. WMA is authorized by Saginaw Valley State University pursuant to a Charter Contract specifically specifies that:

Pursuant to the Michigan Revised School Code (“Code”), and in particular being Part 6A, Sections 380.501 through and including 380.507 of the Michigan Compiled Laws, and Act No. 416 of the Public Acts of 1994, the Saginaw Valley State University Board of Control (“University Board”) grants a contract confirming the status of a public school academy in this state to the Waterford Montessori Academy (the “Academy”), a Michigan public school academy.

Furthermore, the Charter Contract identifies the Academy as a governmental entity and an independent body corporate as noted in Article III of the Charter Contract:

### **ARTICLE III REQUIREMENT THAT ACADEMY ACT SOLELY AS GOVERNMENTAL ENTITY**

Section 3.1. Governmental Entity. The Academy shall act exclusively as a governmental entity and shall delegate none of its governmental functions, including the determination to assert or not to assert governmental immunity under Applicable Law.

Section 3.2. Independent Status of the Academy. The Academy is a body corporate and governmental entity authorized by the Code. It is organized and shall operate as a public school academy and a Michigan nonprofit corporation. The Academy is not a division or a part of Saginaw Valley State University. The relationship between the Academy and the University is based solely on the applicable provisions of the Code and the terms of this Contract or other written agreements between the University and the Academy.

Waterford Montessori Academy meets the definition of a charter school pursuant to Section 4310 of the ESEA in that it:

- Is a public school,
- Is authorized in accordance with Michigan’s Revised School Code, Part 6a,

- Is operated under public supervision and direction,
- Operates in pursuit of established educational goals,
- Provides an elementary educational program,
- Is nonsectarian,
- Does not charge tuition,
- Complies with applicable law,
- Is a school of choice,
- Complies with audit requirements, and
- Has a written performance contract with the authorizer.

### **Single-Sex Educational Programs**

Waterford Montessori Academy does not operate any single-sex educational programs.

### **Waivers**

Waterford Montessori Academy does not seek any waivers.

### **Logic Model**

Waterford Montessori Academy has developed a Logic Model based on the identified purpose of this grant application to financially support the replication and expansion of its current program offered at 4860 Midland Avenue. The Logic Model was developed taking into consideration the current education conditions and the population of Waterford Township as well as what activities need to be undertaken to provide appropriate resources for the new facility at Elizabeth Lake Road. The Logic Model includes the overall goal, inputs, processes (planned activities), the expected outputs and outcomes (short-term, intermediate, and long-term).

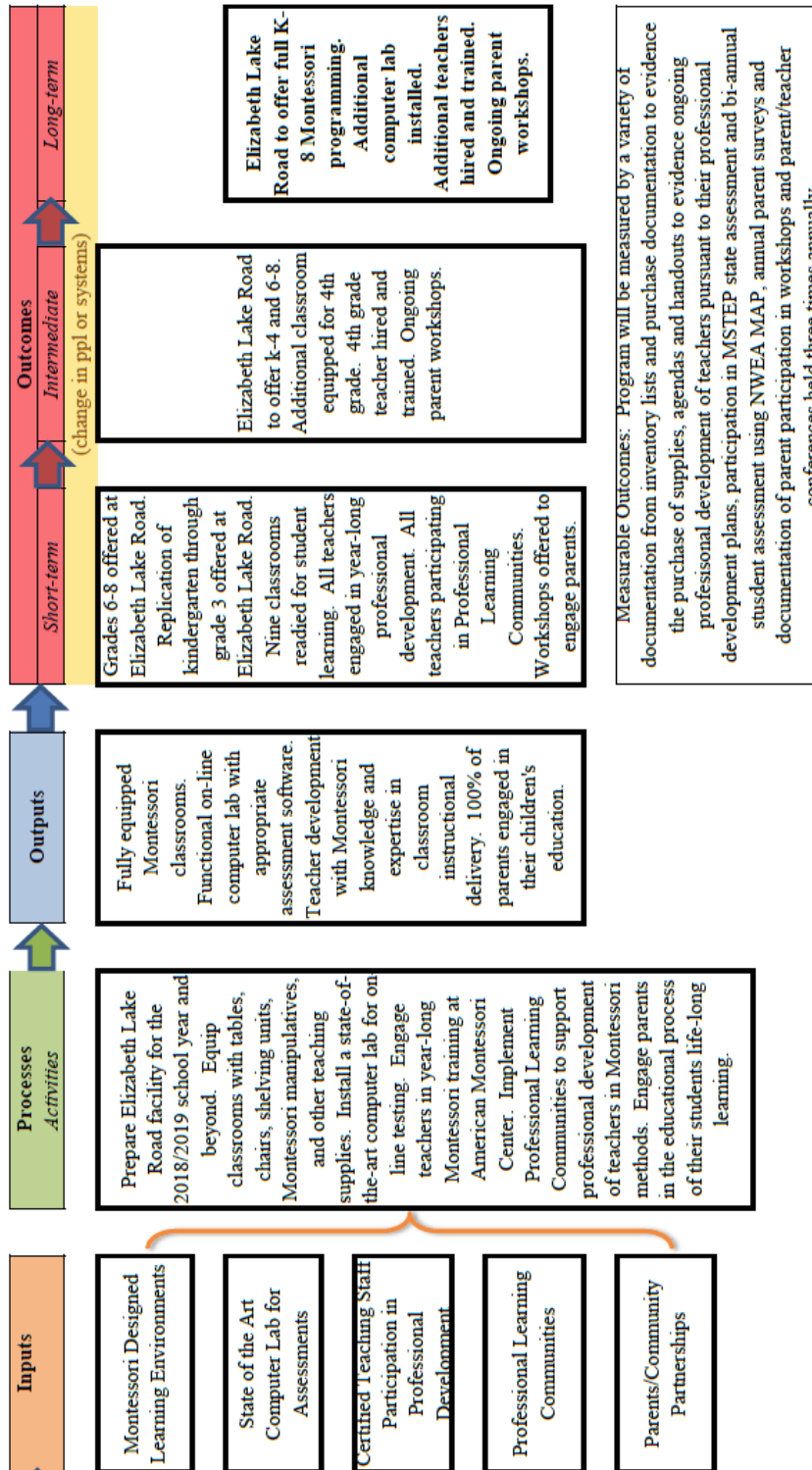
Evaluation of the success of this project as funding through the CSP will be completed using the following Logic Model to drive the evaluation process.



**Program: Waterford Montessori Academy Elizabeth Lake Road Expansion**

Expand (add grade 8) and Replicate (kindergarten to grade 3) the Montessori Model at Waterford Montessori Academy at 4860 Midland to 4350 Elizabeth Lake Road

**Goal of the Project:**



## Audits

A copy of the annual audit prepared by the firm of Taylor and Morgan, PC for the fiscal year ending June 30, 2017 has been included as an attachment to this application.









## ADDITIONAL APPLICATION REQUIREMENTS UNDER 84.282E

### Accountability of Charter under Title I, Part A of the ESEA

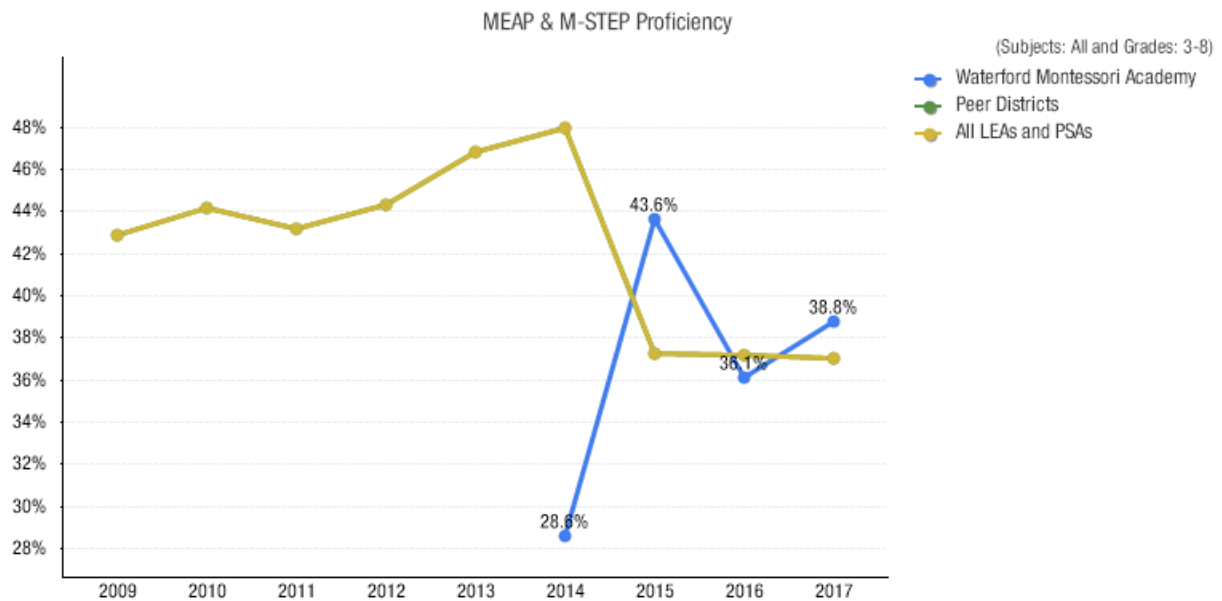
Waterford Montessori Academy, District Code 63929, is treated as a separate school for purposes of accountability and reporting under Title I, Part A. In the 2017-18 school year, the State of Michigan allocated \$7,574 in Title I funds to the Academy. Funds are used to help ensure that all children meet challenging state academic standards.

### Student Assessment Results

The State of Michigan has received approval from the United States Department of Education for its accountability plan under the new Every Student Succeeds Act. Under the new Michigan School Index System public school performance (including charter schools) is measured in six key areas—student growth, student proficiency, school quality/student success,

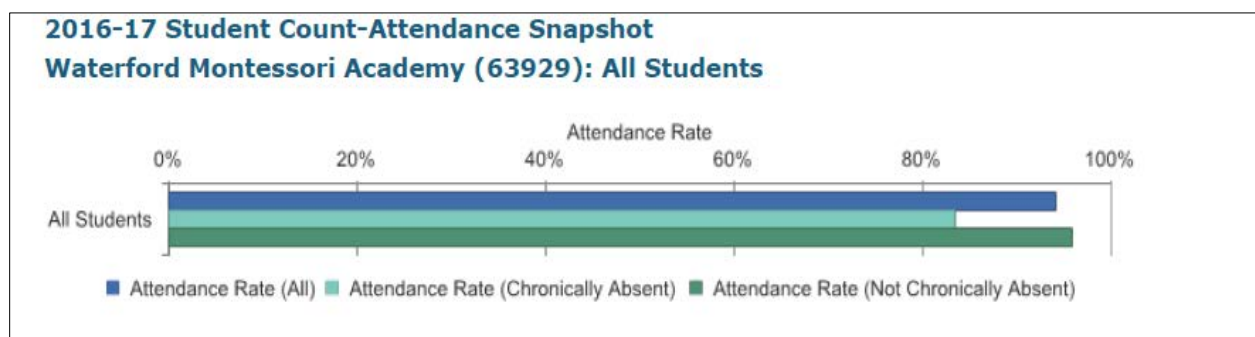
 <div>Overview Overall Index 81.13</div>	 <div>Support Category</div>
 <div>Growth Overview Component Index 82.26</div>	 <div>Proficiency Overview Component Index 81.88</div>
 <div>Graduation Rate Overview Component Index N/A</div>	 <div>English Learner Progress Overview Component Index N/A</div>
 <div>School Quality and Student Success Overview Component Index 74.15</div>	 <div>Assessment Participation Overview Component Index 100.00</div>

graduation rate, English Learner progress, and assessment participation. Schools are graded in each area based on the degree to which it meets its targets. An overall index value ranging from 0-100 is then assigned. This index value is then used to identify schools for support. Waterford Montessori Academy was assigned an overall index value of 81.13. Student proficiency at Waterford Montessori Academy, as measured by the state's MStep program exceeds that of its 927 peers (comprised of other LEAs and PSAs throughout the state).

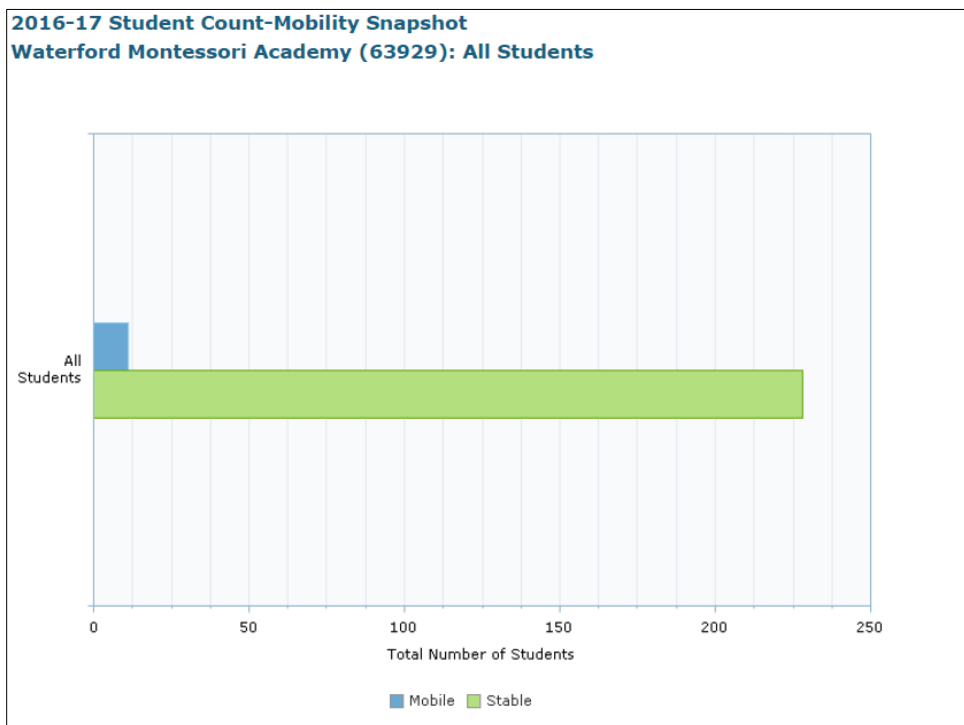


### Attendance and Student Retention Rates

The 2016/17 attendance rate for all students at Waterford Montessori Academy was 94.12%.



Student count data is reported to the State twice each year but is also updated throughout the year to identify mobility of Michigan's students. The following chart depicts a 95% retention rate at Waterford Montessori Academy.



### **Compliance and Management**

There have been no significant compliance or management issues within the last three school years. This includes the areas of student safety and finance.

### **Project Director's Meeting**

The budget detail as prepared includes the attendance of the Project Director and Grant Manager's attendance at the mandatory two-day meeting.

### **Project Evaluation and Performance**

Waterford Montessori Academy shall submit a final performance report at the end of the project period. The final performance report shall include financial information as directed by the Secretary. The final performance report shall also include performance measures related to

student enrollment, achievement and attendance at the Elizabeth Lake Road campus in addition to data related to parent engagement and teacher professional development as these are the activities supported by this grant application. Waterford Montessori Academy possesses the capacity to collect and report reliable, valid and meaningful performance data.

The ultimate goal of this project is not to simply equip classrooms, purchase computers, or provide teacher training; but it is to have a positive impact on student achievement by providing a greater number of students with the opportunity to learn under the Montessori model of education. Adequate and appropriate supplies, professional development and parent engagement are the tools needed to reach this critical goal. Therefore, the ultimate measure of the success of this project is the proficiency and growth of the Academy's students. Thus, this project shall be evaluated as follows:

- By October 1, 2019, the Academy shall increase its enrollment by 60% and the number of students with disabilities and the number of students identified as economically disadvantaged shall also increase proportionately. (Baseline data is based on the 2017/2018 enrollment of 221.) To be measured by pupil accounting data in MSDS.
- By October 1, 2019, the Academy shall continue to demonstrate that students are making sufficient progress to meet state-identified proficiency targets in each tested content area and grade level. (Baseline data is based on mischool.org data indicating a current progress rate of 45% for all making progress toward proficiency or increasing proficiency as compared to the statewide average of 40%.)
- By October 1, 2019, the Academy shall meet or exceed the State of Michigan average on the state-identified proficiency test. (Baseline data is based on mischool.org data

indicating a current proficiency rate of 40% for all students across all subject areas compared to the statewide average of 36%.)

- By June 30, 2019, the percent of Academy students meeting their projected growth scores in both Reading and Math on the NWEA Measures of Academy Progress shall average 80%. (Baseline data shows that 52% of the students are currently above the 50% on the NWEA MAP at a combined level.)

Data collection is made relatively easy as the State of Michigan has made significant strides in its accountability system and provides ready access to assessment data on [www.mischooldata.org](http://www.mischooldata.org). Additional data collection and analysis is provided by [www.eidexinsights.com](http://www.eidexinsights.com).

If awarded, Waterford Montessori Academy shall submit a final performance report that will include financial information and project-specific performance measures in accordance with the above stated measures, baseline data and targets.

Additional information about Waterford Montessori Academy can be obtained at [www.waterfordmontessori.org](http://www.waterfordmontessori.org) or by writing Jeremy Gilliam, Project Director at:

Waterford Montessori Academy  
6840 Midland Avenue  
Waterford, MI 48329

A copy of this application has been sent to the State of Michigan, Single Point of Contact.