



Sequoia Montessori School

A Public Charter School in Salem, Oregon

April 7, 2014

Kate Pattison
Program Analyst, Office of Learning
Oregon Department of Education
255 Capitol Street NE
Salem, OR 97310-0203

Dear Kate,

Thank you for the opportunity to provide additional information to our charter proposal. Attached you will find detailed information in response to your request for additional information dated February 27, 2014. We are happy to provide this information to assist the State in understanding our plan to create an authentic Montessori school accessible to all children in Salem and Keizer.

Please feel free to contact me if you have further questions. We look forward to continuing a strong partnership with you to provide excellent educational opportunities in Oregon.

Sincerely,

Gaelen McAllister
Board President
gaelenmcallister@gmail.com
503-269-2164

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1. BUDGET:

- A. Three year budget with Federal Grant**
- B. Three year budget without Federal Grant**
- C. Budget Narrative**

Sequoia Montessori School (SMS) has developed two three-year plans for revenue and expenses; one with Federal implementation grant support funds, one without. The budget assumptions are based on current conditions; minor fluctuations are to be expected in the 18 months before the school opens. The following budgets and budget narrative show a prudent, well thought out plan to operate the school.



A. Three-Year Budget without Federal Grant B. Three-Year Budget w/ Federal Grant

3-Year Budget WITHOUT Federal Grant				3-Year Budget WITH Federal Grant			
	1st Yr (67admw)	2nd Yr (99admw)	3rd Yr (99admw)		1st Yr (67admw)	2nd Yr (99admw)	3rd Yr (99admw)
90% Funding				90% Funding			
Assets	\$45,000			Assets	\$45,000		
Cash in hand	\$9,500			Cash in hand	\$9,500		
State Sch Funds @ \$6540	\$394,362	\$582,714	\$582,714	State Sch. Funds @ \$6540	\$394,362	\$582,714	\$582,714
Federal Charter Sch. Grant	\$0	\$0	\$0	Federal Charter Sch. Grant	\$185,000	\$185,000	\$0
Contributions	\$10,000	\$15,000	\$15,000	Contributions	\$10,000	\$15,000	\$15,000
Reimbursements	\$750	\$1,000	\$1,000	Reimbursements	\$750	\$1,000	\$1,000
Bridge Loan	\$60,000			Bridge Loan	\$60,000		
Total Revenue	\$474,612	\$598,714	\$598,714	Total Revenue	\$659,612	\$783,714	\$598,714
Expenditures				Expenditures			
Personnel				Personnel			
Consultants	\$2,000	\$3,000	\$3,000	Consultants	\$12,000	\$9,000	\$3,000
Administrator	\$70,000	\$70,000	\$70,000	Administrator	\$70,000	\$70,000	\$70,000
Teaching Staff	\$88,000	\$132,000	\$132,000	Teaching Staff	\$88,000	\$132,000	\$132,000
Classroom Assistants	\$48,000	\$72,000	\$72,000	Classroom Assistants	\$48,000	\$72,000	\$72,000
Health Insurance	\$24,000	\$33,600	\$33,600	Health Insurance	\$24,000	\$33,600	\$33,600
Other Fringe	\$1,938	\$2,862	\$2,862	Other Fringe	\$1,938	\$2,862	\$2,862
PERS Employer	\$45,917	\$61,075	\$61,075	PERS Employer	\$45,917	\$61,075	\$61,075
PERS Employee	\$12,360	\$16,440	\$16,440	PERS Employee	\$12,360	\$16,440	\$16,440
Payroll Taxes (.0765 + .025)				Payroll Taxes (.0765 + .025)			
Federal & State Rates	\$18,540	\$24,660	\$24,660	Federal & State Rates	\$18,540	\$24,660	\$24,660
Training/Staff Development	\$4,000	\$1,000	\$1,000	Training/Staff Development	\$64,000	\$50,000	\$1,000
Substitutes	\$2,500	\$4,500	\$4,500	Substitutes	\$2,500	\$4,500	\$4,500
Total Payroll Expense	\$317,255	\$421,137	\$421,137	Total Payroll Expense	\$387,255	\$476,137	\$421,137
Operational Expense				Operational Expense			
Accounting & Payroll Serv.	\$7,500	\$7,500	\$7,500	Accounting & Payroll Serv.	\$7,500	\$7,500	\$7,500
Assessment & Testing	\$4,500	\$4,500	\$4,500	Assessment & Testing	\$4,500	\$4,500	\$4,500
Audio Visual Eq	\$1,000	\$1,000	\$1,000	Audio Visual Eq	\$1,000	\$5,000	\$1,000
Audit & Tax Prep Fees	\$3,000	\$3,000	\$3,000	Audit & Tax Prep Fees	\$3,000	\$3,000	\$3,000
Bank Service Charge	\$75	\$75	\$75	Bank Service Charge	\$75	\$75	\$75
Bus passes	\$1,500	\$2,000	\$2,000	Bus Passes	\$1,500	\$2,000	\$2,000
Classroom Supplies	\$6,000	\$2,500	\$2,500	Classroom Supplies	\$26,000	\$32,500	\$2,500
Computers	\$3,000	\$1,500	\$1,500	Computers	\$3,000	\$3,000	\$1,500
Custodial	\$5,000	\$7,500	\$7,500	Custodial	\$5,000	\$7,500	\$7,500
Dues & Subscriptions	\$600	\$600	\$600	Dues & Subscriptions	\$600	\$600	\$600
Governing Board	\$1,250	\$250	\$250	Governing Board	\$5,250	\$5,250	\$250
Insurance	\$4,500	\$4,500	\$4,500	Insurance	\$4,500	\$4,500	\$4,500
Furniture	\$15,000	\$15,000	\$15,000	Furniture	\$25,000	\$35,000	\$15,000
Marketing	\$2,000	\$1,000	\$1,000	Marketing	\$4,000	\$4,000	\$1,000
Misc	\$500	\$500	\$500	Misc	\$1,500	\$1,500	\$500
Postage and Mailing	\$1,500	\$800	\$800	Postage and Mailing	\$1,500	\$1,800	\$800
Printing & Copier	\$1,800	\$2,300	\$2,300	Printing & Copier	\$1,800	\$2,300	\$2,300
Parent Training	\$1,500	\$1,500	\$1,500	Parent Training	\$1,500	\$1,500	\$1,500
Rent	\$25,000	\$35,000	\$35,000	Rent	\$25,000	\$35,000	\$35,000
Renovations	\$15,000	\$5,000	\$5,000	Renovations	\$25,000	\$30,000	\$5,000
Repairs & Maintenance	\$1,500	\$1,500	\$1,500	Repairs & Maintenance	\$3,000	\$11,500	\$1,500
Supplies	\$1,500	\$2,500	\$2,500	Supplies	\$5,500	\$6,500	\$2,500
Taxes and License	\$750	\$750	\$750	Taxes and License	\$750	\$750	\$750
Telephone	\$1,000	\$1,000	\$1,000	Telephone	\$1,000	\$1,000	\$1,000
Tech and Internet	\$2,000	\$2,000	\$2,000	Tech and Internet	\$4,000	\$4,000	\$2,000
Technology Software	\$1,000	\$1,500	\$1,500	Technology Software	\$3,000	\$1,500	\$1,500
Textbooks and Curriculum	\$13,200	\$20,000	\$20,000	Textbooks and Curriculum	\$33,200	\$40,000	\$20,000
Utilities	\$4,000	\$6,000	\$6,000	Utilities	\$4,000	\$6,000	\$6,000
Bridge loan payment	\$13,587	\$13,587	\$13,587	Bridge loan	\$13,587	\$13,587	\$13,587
Total Operational	\$138,762	\$144,862	\$144,862	Total Operational	\$215,262	\$271,362	\$144,862
Total expenses	\$456,017	\$565,999	\$565,999	Total expenses	\$602,517	\$747,499	\$565,999
Contingency	\$18,595	\$32,715	\$32,715	Contingency	\$57,095	\$36,215	\$32,715
Total budget	\$474,612	\$598,714	\$598,714	Total budget	\$659,612	\$783,714	\$598,714



C. Budget Narrative

Assets in hand: The school has already acquired these assets through the Charter School Planning Grant:

1. **Cash:** The school has \$9500 cash on hand as of April 1, 2014.
2. **Training:** The school purchased the development of a training module for Spanish-speaking parents of preschoolers to learn about Montessori. This includes a training outline, manipulatives, printed items and take home materials.
3. **Classroom materials:** The school has purchased \$11,000 in Montessori classroom materials.
4. **Computer** One ASUS K55A Notebook. Software licenses include: Microsoft Office Suite, QuickBooks, Pages.
5. **Governing Board:** The Board has acquired a 501(c)3, developed board bylaws and policies, and received training in board governance and responsibilities.
6. **Printer/copier:** One Xerox® WorkCentre® 6505dn Color Multifunction Printer
7. **Tech and Internet** A bilingual website has already been developed and four board members are trained to update the site.
8. **Textbooks/Curriculum:** \$18,000 of Montessori curriculum and books were purchased with planning grant funds.

Revenue This is the anticipated revenue:

1. **State School Funds** 67admw first year, 99admw @ \$6540, based upon the 2013/14 charter school rate for Salem Keizer School District. This amount would likely increase in 2015 by 3-5%, but we have conservatively budgeted at the current allocation. Calculation is based upon 60 student enrollment with a weighted 67 ADMw in the first year and 99 ADMw in the second and third year. This is also a conservative calculation because the target for ELL and poverty is actually 30% which would yield a higher admw.
2. **Federal Charter School Grant** The anticipated application date for this grant is June 2014. Typically the award is announced in September. The school would have an opportunity to apply in 2014 and 2015. We have provided budgets with and without the grant award. We anticipate requesting \$185,000 a year for the two year start up period.
3. **Contributions** The school has planned for adult-run fundraisers in the fall of each year. Estimated contributions are \$10,000 the first year and \$15,000 the second year. Once the first class is formulated, parents will be asked to help with a fundraising event to take place in the early Fall of 2015. The school board members have substantial experience with successful school fundraisers and feel that \$10,000 is a conservative fundraising goal.
4. **Reimbursements** These are minimal reimbursements for materials, fees, etc. There will be no mandatory fees. Parents will be given the opportunity to contribute to the activity fund or donate volunteer time to the equivalent of \$200 a year or 10 hours of volunteer time.

Expenditures

1. **Personnel**
 - a. **Consultant** with a Montessori Certification to assist with staff training plans \$2000
 - b. **Administrator:** \$70,000 This is calculated at full-time
 - c. **Classroom Teachers:** 2 at \$44,000each. This is mid-range for current Montessori charter schools.



- d. **Classroom Assistants:** 2 classroom assistants @ \$22,000 each
- e. **Health Insurance:** \$400 per month per employee based on gold plan quote from Oregon Health Co-op
- f. **Other Fringe:** \$431 per FTE
- g. **Payroll Taxes:** Based on current federal and state withholding requirements
- h. **PERS Employer** This is budgeted at code 3000 state rates of 22.29%
- i. **PERS Employee:** This is budgeted at 6% of staff payroll
- j. **Substitutes:** Budgeted at two substitute days per month of school year
- k. **Training/Staff Development:** \$4000 At a minimum, this includes: Sexual Misconduct - Staff to Student (HB 2062), Child Abuse Identification & Prevention, Blood borne Pathogens, Sexual Harassment. The school will use \$60,000 of the Federal grant to offer more extensive Montessori training and ELL training to teachers and teaching assistants in the first year and \$49000 in the second year.

2. Operational Expense

- a. **Accounting & Payroll Services:** \$7500 An experienced charter school accountant, Brooke Serres has quoted this amount
- b. **Assessment & Testing:** Per state guidance, we have budgeted \$4500 for testing although the school expects to have ten or fewer third grade students in the first year. These funds will also cover ELPA training and testing.
- c. **Audio Visual Equipment:** \$1000 This will provide one set up for student and staff film making and sharing. One used data projector and one small video camera.
- d. **Audit & Tax Preparation Fees:** \$3000 This quote is provided from the school's accountant, Grove Mueller Swank
- e. **Bank Service Charge:** \$75 The school currently has a no fee checking account. The anticipated amount would cover bounced checks, transfer fees, etc.
- f. **Bridge loan interest/principle:** If required, the school will access a line of credit for the start up expenses that occur ahead of school opening. The principle and interest are calculated at 5% over 5 years, \$13,587 annually. This payment would be eliminated when the school receives the federal grant and can access those funds for start up activities.
- g. **Bus Passes:** \$1500 This would include a fund to provide bus passes to families unable to use any of the other transportation options
- h. **Classroom Supplies:** \$6000 for basic classroom supplies for two classrooms. This would be increased by \$20,000 with the federal funding.
- i. **Computers:** \$3000 The school intends to purchase refurbished computers to use in each classroom and already had purchased a high end laptop for the administrator. This includes hardware, peripherals and software.
- j. **Custodial:** \$5000 This is calculated at \$40 per contact day for school sites where custodial is not included.
- k. **Dues & Subscriptions:** \$600 This will be used for Montessori organization membership dues to help in recruiting and training
- l. **Furniture:** \$15000 Furniture is calculated at \$7500 per classroom and will be augmented by volunteer created shelving and tables. With the Federal grant an additional \$10,000 will be spent on furniture.
- m. **Governing Board:** \$1250 Training, legal guidance and travel for recruiting staff. The implementation grant will increase this fund by \$4000 and provide more opportunities for Board training.
- n. **Insurance:** \$4500 liability-PACE quote



- o. **Marketing:** \$2000 This includes translating and printing materials for outreach. The implementation grant will add another \$2000 which will allow for more intensive outreach.
- p. **Misc:** \$500
- q. **Postage and Mailing:** \$1500 Provides for 3000 first class mailings per year, which is more than sufficient for a school of 60 students
- r. **Parent Training:** \$1500 Series pre-lottery Montessori classes for Spanish speaking parents, 12 hours teaching time, eight hours of prep, supplies and materials
- s. **Printing & Copier:** \$1800 The school already owns a copier and extra toner cartridges. This will cover printing many of the initial classroom materials.
- t. **Renovations:** \$15,000 has been set aside. The current potential sites require less than \$5000 of renovations, but the school has budgeted for unexpected requirements. The implementation grant will allow for an additional \$10,000.
- u. **Rent:** \$25,000 This is adequate for the expected rent for three of the sites. The combined budgeted occupancy costs are \$50,500 without the federal grant and \$62,000 with the federal grant.
- v. **Repairs & Maintenance:** \$1500 This is conservatively budgeted as we don't have a definite site. The implementation grant will add an additional \$1500 to this category.
- w. **Supplies:** \$1500 a \$25 per enrolled child is the base calculation for this category. The suggested, but not required parent donated fees will augment this category. The implementation grant will increase available supply funds by \$4000.
- x. **Taxes and License:** \$750 Includes required state and federal filing fees
- y. **Tech and Internet:** \$2000 Small business internet service @\$166/mo Comcast. The school will purchase additional connectivity equipment with the implementation grant.
- z. **Technology Software:** \$1000 This will provide basic Microsoft licenses for the ten student computers. With the additional \$2000 implementation fund the school will purchase age appropriate math and science learning software as decided by the administrator and staff.
- aa. **Telephone:** \$1000 One main phone with Comcast package (\$20/mo) and cell phone for administrator (\$60/mo)
- bb. **Textbooks and Curriculum:** \$13,200 is budgeted for two classrooms. The school has already acquired \$18000 of curriculum materials and books. The implementation grant will add another \$20,000 to this line item.
- cc. **Utilities:** \$4000 This is budgeted at \$400 a month of school occupancy and may be less depending on the building the school chooses.



2. FACILITIES:

- A. **Research local options and provide 3 possible facilities budgets based on findings. Include, at a minimum, utilities, renovations, ADA compliance, other local code requirements, maintenance, grounds, etc.**

A. Potential Locations for Sequoia Montessori School

Five potential locations have been identified for the school: an existing school at a church site, a school property that is not currently in use, a farm school site, a church site previously used for education and new mixed use construction. All five locations are in neighborhoods served by public elementary schools with significant numbers of economically disadvantaged students and significant populations of English Language Learners. All but one school has below average performance on the most recent Oregon State tests.

The Korean Church of Salem is within our price range, currently has a Head Start program in place at the school, and is willing to rent to Sequoia if Head Start vacates the space. The Head Start program is scheduled to move in Spring of 2015. The rental amount of **\$1400 per month** includes two classrooms, a commercial kitchen, two office spaces, restrooms, storage, and an outdoor fenced play space. The church has also offered use of its community rooms for parent meetings, events and overflow activities.

- **Utilities:** Included in the rent.
- **Renovations:** The space does not require any immediate updates aside from a partition for the space if Head Start removes the one they have in place.
- **ADA accessibility and code compliance:** The classrooms are ADA accessible, well lit, sprinklered and alarmed.
- **Maintenance and grounds:** Included in the rent, less janitorial. Leasor believes the current Head Start equipment in the outdoor play area will remain if the program vacates.
- **Community Collaboration Potential:** The school is close to the assets of downtown Salem, including Willamette University and the Capitol mall.
- **Accessibility:** This location is in the Richmond School neighborhood and a block from a major bus line on State Street (routes 16, 20 and 7).
- **Demographics** of neighborhood school population:
 - English Learners 47%
 - Economically disadvantaged >95%
 - Students with disabilities 19%
 - Number of different languages spoken: 9
 - Asian 1%
 - American Indian/Alaska Native 1%
 - Black/African American 1%
 - Native Hawaiian/Pacific Islander 2%
 - Multiracial 6%
 - Hispanic/Latino 61%
 - White 28%

The Oregon School for the Deaf is also within our budgeted price range, on a State-run school property, and is interested in establishing a partnership with our school. Additionally, the school already houses two other charter schools. The rental amount is estimated by the State



Procurement Office (based on other occupancy rates) at **\$0.77/sq ft, or \$2310 per month**. The space is well lit, has a full kitchen, an office, two classroom spaces, covered outdoor fenced play space, and cafeteria access through OSD for those with free and reduced lunch. The site also has the added value of room to grow the third classroom for upper elementary in the future.

- **Utilities:** Included in the rent.
- **Renovations:** The space does not require any immediate updates outside of some cosmetic painting and cleaning, which would be completed by facilities at OSD.
- **ADA accessibility and code compliance:** The space is ADA accessible and up to fire code with visual alarms and sprinklers.
- **Maintenance and grounds:** Included in the rent, less janitorial.
- **Community collaboration potential:** The potential for collaborating with the School for the Deaf, Community Action Head Start Preschool, JGEMS and Eagle Charter offer exciting possibilities for both educational and cost saving opportunities.
- **Accessibility:** This location is in the Highland School neighborhood and along a major bus line on Pine Street (Routes 13, 19 and 3).
- **Demographics** of neighborhood school population:
 - English Learners 64%
 - Economically disadvantaged >95%
 - Students with disabilities 25%
 - Number of different languages spoken: 7
 - Native Hawaiian/Pacific Islander 1%
 - Black/African American 1%
 - American Indian/Alaska Native 2%
 - Multiracial 4%
 - Hispanic/Latino 49%
 - White 43%

Pringle Creek Community has offered their Carpentry building for the school.

This would make a good farm school option, as the students would have access to a more rural campus, a garden and a greenhouse. The rental amount of **\$1.17/sq ft** includes two classrooms and a total used space of 3400 sq ft, including office space, kitchen, storage, and use of outdoor space for a garden.

- **Utilities:** Included in the rent.
- **Renovations:** The space would be made ready for occupation by the lessor, as indicated in the letter of interest.
- **ADA accessibility and code compliance:** The classrooms are ADA accessible. The building will be brought up to fire code for school occupancy by the lessor.
- **Maintenance and grounds:** Included in the rent, less janitorial.
- **Community Collaboration Potential:** Pringle Creek is an intentional sustainable community that focuses on creating community around environmental responsibility. There are opportunities to collaborate on their extensive gardening, sustainable energy and preservation efforts on the site. Pringle Creek has offered use of an indoor gym for enclosed play space, and is adjacent to a park.
- **Accessibility:** This location is in the Morningside school area and within two blocks of a bus line (Routes 7 and 6).
- **Demographics** of neighborhood school population:
 - English Learners 7%
 - Economically disadvantaged 51%
 - Students with disabilities 15%
 - Number of different languages spoken: 13



- Native Hawaiian/Pacific Islander 1%
- Asian 2%
- Multiracial 4%
- Hispanic/Latino 15%
- White 78%

Englewood United Methodist Church has offered 3800 square feet of space in their building, previously used by a home schooling group, for **\$0.60/sq ft or \$2280 per month full service, including janitorial**). The space offered includes access to a kitchen in the occupied classrooms, two smaller rooms off the main area for use as office space, storage or library, and the potential to use additional church space for functions or gatherings for the school. The church is within walking distance of Englewood Park, and in an established school zone. There is ample off street parking for safe pickup and drop-off of students.

- **Utilities:** Included in the rent.
- **Renovations:** The space does not require any immediate updates aside from a partition and some cosmetic painting.
- **ADA accessibility and code compliance:** Code compliant for fire, health and safe egress. ADA accessible with a stair lift for wheelchair accessibility.
- **Maintenance and grounds:** Included in the rent.
- **Community Collaboration Potential:** The site is located near the downtown area, including the Capitol mall and Willamette University. There is a potential to share resources at Englewood Elementary with the cooperation of the school district, such as afterschool programs and lunch service.
- **Accessibility:** Located two blocks from Englewood Elementary. On major bus artery, served by routes 20 and 2.
- **Demographics of neighborhood school population:**
 - English Learners 12%
 - Economically disadvantaged 75%
 - Students with disabilities 17%
 - Number of different languages spoken: 10
 - Black/African American 1%
 - Asian 1%
 - American Indian/Alaska Native 2%
 - Native Hawaiian/Pacific Islander 2%
 - Multiracial 8%
 - Hispanic/Latino 24%
 - White 61%

Pringle Creek Square is the site of new construction on Commercial Street adjacent to downtown and Riverfront Park, with 7,000 sq ft of commercial space available for custom build out. This building is set to open in the Summer of 2015, with apartments above and the school of the first floor. It is the most expensive option of the four at **\$2.05/sq ft full service**, but this lease amount includes property tax and build out costs up to \$45/sq ft. The advantage of such a space is the ability to create our own plan and have the space to expand the school while renting the extra space in the years that we only have lower elementary classrooms. The developer and broker are mutually interested in the school occupying the space. The Board realizes this is the costliest option and will only proceed if the cost to the school can be reduced. Once the school receives the charter, we will be in a better position to contact potential private foundations to assess possibilities for funding. If so, the school would pursue grants to cover the



build-out costs in exchange for a long term lease deal to include substantially reduced rent. We realize this site would be more challenging to occupy, but the option is open for exploration.

- **Utilities:** Included in the rent.
- **Renovations:** None. Costs for build out of the space included in the lease amount.
- **ADA accessibility and code compliance:** The site would be built to code for educational occupancy and made ADA accessible per current new building code.
- **Maintenance and grounds:** Included in the rent.
- **Community Collaboration Potential:** The facility is in downtown Salem, adjacent to Riverfront Park. It offers access to all downtown assets including the Salem Public Library, Willamette University, the Capital buildings and downtown businesses.
- **Accessibility:** This location is in the Bush School neighborhood. It is close to the downtown transit mall, where every bus line in Salem merges, and along the major southern bus artery of Commercial Street (Routes 1, 8, 13, 21 and all routes at the transit center).
- **Demographics** of neighborhood school population:
 - English Learners 39%
 - Economically disadvantaged >95%
 - Students with disabilities 25%
 - Number of different languages spoken: 7
 - Native Hawaiian/Pacific Islander 1%
 - Black/African American 1%
 - American Indian/Alaska Native 2%
 - Multiracial 4%
 - Hispanic/Latino 49%
 - White 43%



Korean Church of Salem
219 19th St. S.E. Salem, OR 97301
(503)399-9388

March 24, 2014

To whom it may concern;

The Korean Church of Salem is interested in renting space to Sequoia Montessori School should it become available if Head Start vacates the property. This letter is not a binding agreement on the Church to rent the space to Sequoia Montessori School, or a contact for rental obligating either party. The Church would be able to offer space for two classrooms, storage, restrooms, offices and a kitchen, as well as access to fenced outdoor play space.

The current space is ADA accessible, compliant with fire code for school occupancy with fire alarms and sprinkler system, open and with abundant light.

Community Action Head Start rents the space for two classrooms at a rate of \$1400 a month. The church would be willing to rent to Sequoia Montessori School for a similar rate should it become available.

Pastor of the Korean Church of Salem

David Jeon *BK Jeon*

A handwritten signature in black ink that reads "David Jeon".



ROB S. SAXTON

Deputy Superintendent of Public Instruction

March 25, 2014

To the Montessori Charter School;

We are interested in your submission of a rental agreement for Wallace Hall on the campus of Oregon School for the Deaf. We anticipate a letter of intent while you are in your planning stages for a prospective lease agreement beginning Fall 2015. Thank you for considering our campus – we look forward to forming a lasting relationship with you.

Kindest regards,

A handwritten signature in purple ink, appearing to read "Dr. Sharla Jones".

Dr. Sharla Jones
Director
Oregon School for the Deaf



Sequoia Montessori School

March 25, 2014

Sharla Jones, Director
Oregon School for the Deaf
999 Locust St. NE
Salem, OR 97301

Dear Sharla,

We are delighted to express our interest in potentially renting the Wallace Hall property on the Oregon School for the Deaf campus for our public charter Montessori school set to open in the fall of 2015.

It is our understanding that the property would be available for long term lease at the rate of \$.77 per square foot. The school would initially enroll 60 students and would grow in subsequent years, so we would like the opportunity to lease more of the building over time. Initial space needs are estimated to be 2400 square feet.

Building improvements required for occupancy will be negotiated at the time of crafting a formal lease. The school is open to funding some improvements in exchange for rent credit.

The school would also be interested in shared use of the gym and food service area. We look forward to being able to offer our students the opportunity to learn from and socialize with the students at the Oregon School for the Deaf.

We expect to have a sponsorship agreement with the State of Oregon in the summer of 2014 and will then be prepared to formally negotiate an agreement.

This letter is for discussion purposes and is not intended to be a contract binding either party. There will not be a binding agreement between the school (tenant) and the State (landlord) until both parties have executed and delivered a definitive, binding, written Lease Agreement to be prepared by the Landlord and approved by the tenant.

Sincerely,

Gaelen McAllister, Board President
Sequoia Montessori School



Pringle Creek
COMMUNITY

3911 Village Center Drive
Salem, OR 97302
Phone: 503-315-1055
E-Mail: info@pringlecreek.com
Web: www.pringlecreek.com

To: Sequoia Montessori School
From: Pringle Creek Community
CC: N/A
Date: March 5, 2014
Re: Charter School Lease

Memorandum of Interest

Pringle Creek Community is interested in entering lease negotiations with Sequoia Montessori School regarding the location of their charter school, which is set to open in September 2015.

Currently, Pringle Creek Community has a commercial site, Carpentry Building, which would be an ideal location for the school.

- 3400 square feet total
- 1200 square foot classrooms (x2)
- Office space
- Kitchen / child accessible kitchen
- Storage
- Two ADA restrooms
- Access to parks/open space
- Parking
- Safe drop-off and pick-up location
- Code compliant for fire, health & safety egress
- Accessible to walking, biking, and transit
- Natural light, windows on three walls
- Access to gardens and greenhouses
- Close proximity to middle school or indoor basketball facility for gym access
- Low maintenance costs
- Energy efficient
- Located under four miles from downtown Salem

Pringle Creek Community plans to lease Carpentry Building at a market rate of \$1.47 per square foot, triple net. Organizations with non-profit status are eligible to receive a 20% discount on the lease rate, bringing the price per square foot to \$1.17.



MOSAR COMMERCIAL PROPERTIES

350 Mission St. SE, Suite 101, Salem, OR 97302 | office 971-273-7670

March 24, 2014

Mike Mosar
Mosar Commercial Properties
350 Mission Street, Suite 101
Salem, OR 97301

RE: Pringle Square South

Mike,

My client is prepared to Lease space at Pringle Square South. Below are the proposed terms and conditions.

Landlord: Pringle Square South, LLC

Tenant: Sequoia Montessori

Premises: 315 Commercial Street SE, 6,750 SF

Use: School

Lease Term: The initial lease term shall be five (5) years from the Rent Commencement Date.

Lease Rate: \$2.05 per square foot, per month (\$13,837.50) Full Service, Including Janitorial.

Tax Relief: The parties agree that the Tenant shall have the right to seek relief from ad-valorem property taxes on the subject property pursuant to ORS regulations as a non-profit entity. If the property taxes are reduced, the lease rate shall be reduced in direct correlation at the psf rate and reflected in an addendum to be signed by both landlord and tenant and included as part of the original lease document. Said reduction shall be in effect for any existing space and any space moving forward.

Annual Increase: Lease rate shall increase annually by 3% at the anniversary date of the lease commencement.

Occupancy Date: Upon completion (estimated July, 2015).

Rent Commencement: Three (3) months after delivery of space for the purpose of computer, furniture and other fixtures and enrollment.

Security Deposit: Equal to one (1) month's rent at the time of funding.

Renewal Options: The Tenant shall have three (3) Renewal Options of five (5) year each, conditioned upon the tenant not being in default of any condition of their lease. The lease rate for the first Renewal Option shall increase by 3% each year. The lease rate shall correct to market rate, starting on the first day of the second Renewal Option. Then increase by 3% annually thereafter. All other lease terms shall remain the same.

Assignment: The Tenant shall have the right to assign their lease at any time with the prior written approval of the Landlord, which shall not be unreasonably withheld.

Tenant's Expense: Tenant shall be responsible for paying for its: phone/internet access, security monitoring, content and liability insurance.

www.mosarcommercial.com



Landlord Expenses: Landlord shall be responsible for paying for: electricity, gas, water/sewer, trash removal, landscape maintenance, HVAC service, repair and replacement, exterior building maintenance, roof and structural repair and replacement, fire and extended coverage insurance janitorial, interior building maintenance, and real property taxes.

Parking: Tenant shall be permitted the use of 10 parking spaces.

Signage: Landlord at Landlord's sole expense shall pay for and install Tenant's signage on the building directory signage and at the entry of its suite. Sign specifications including design will be provided to Landlord by Tenant. All signs shall meet City of Salem sign code.

Tenant Improvements: Tenant shall be provided a \$45.00 per square foot tenant improvement allowance. Tenant improvement allowance shall be in addition to a shell space which shall be defined as: HVAC on roof and ducted to space, electrical and water stubbed to suite, walls open to framework, open ceiling, gypcrete floors and demising wall established.

Tenant Improvements shall include:

1. Secured Reception area and entry(s)
2. Two administrative offices
3. Kitchen
4. Storage room
5. Three classrooms
6. Indoor play area/gym
7. Restrooms

Unused Tenant Improvement Allowance: If the Tenant is able to secure grants for a portion of the Tenant Improvements and/or if the Tenant Improvements cost less than the budgeted \$45.00 psf, the unused Tenant Improvement Allowance shall be credited to the Tenant as Additional Free Rent.

Brokers. Landlord and Tenant are represented by Mike Mosar, Principal Broker of Mosar Commercial Properties. Landlord shall be responsible for all brokerage fees as agreed to in listing agreement.

Response date: March 28, 2014

This letter is for discussion purposes and is not intended to be a contract binding either party. There will not be a binding agreement between the Landlord and Tenant until both parties have executed and delivered a definitive, binding, written Lease Agreement to be prepared by the Landlord and approved by the Tenant.

Submitted By:

Mike Mosar
Principal Broker
Mosar Commercial Properties



Proposal for Use of Building at Englewood United Methodist Church in Salem by the Charter Montessori School

The Board of Trustees of Englewood United Methodist Church (Church) are pleased to submit this proposal for use of their building to the Sequoia Montessori School (SMS) which wishes to start an early-elementary school for students in the Salem area in September, 2015. The United Methodist tradition has long been a strong advocate for education. In fact, Willamette University, the "oldest university in the West", was founded by Methodist missionaries and congregants a few years after the first groups of pioneers had gotten established. Based on that tradition, the Church is pleased to propose the use of its building to SMS to assist them getting started offering their unique educational methodology to the children of Salem.

This proposal is based on information the Church received through personal and e-mail conversations with a couple people who are on the planning team for the SMS. Please understand that this proposal is just the start of a process of figuring out how the Church and SMS can collaborate on usage and fees so that the needs of both partners are adequately met. Thus, this proposal is just the beginning of a negotiating process that we hope will end in SMS choosing to use the Church.

Building Use:

1. The SMS has requested use of a section of the Church building for daily school use Monday through Friday, from approximately 8:00 a.m. to approximately 4:00. Their school calendar will coincide with the calendar adopted by the Salem-Keizer School District regarding holidays and vacation days.
2. The SMS would use most of the Basement Floor Level of the building. The area to be used is approximately 3,800 sq. ft., which includes two small classrooms, one of approximately 192 sq. ft. and the other approximately 216 sq. ft.. One room has wall-long cabinets on the west end and the other has a closet storage area.
3. In addition to the large common-use area and the two small classrooms listed above, SMS would also have access to the kitchen. This would enable them to use the refrigerator to store lunches and snacks, and to use counter tops and sinks as needed. Use of stove top and oven would be allowed on an as-needed basis after SMS staff had been appropriately trained.
4. Staff and students would also have use of the two bathrooms on the basement level, as well as both bathrooms on the Main Sanctuary Level of the building as needed.



5. If the cabinets and closet storage spaces in the small classrooms on the Basement Floor Level were not sufficient for all the needs of SMS, the Church would work with them to identify additional storage opportunities on that level or the Top Floor Level of the building.

Additional Pluses of the Church Site:

- a. Convenient off-street parking for staff and visitors.
- b. Safe location and process for drop-off and pick-up of students.
- c. Large parking lot for outside recreation when weather allows.
- d. Code compliant for fire, health and safety egress.
- e. The Church is on the corner of NE 17th and Nebraska, so there is immediate access to biking and public transportation. Nebraska is half way between D Street and Market Street.
- f. The Church is approximately 1.5 miles from downtown Salem so is wonderfully located in Central Salem.

Financial Information:

1. The Church plans to lease the above identified area at a market rate of \$.60 per square foot. **Please Note: This single fee covers use of the space and also covers all costs of utilities, bathroom and other supplies and the janitorial needs the Church will incur through this lease process. The \$.60/sq. ft. covers everything.**
2. On those months when there is no school for a week or more, e.g., Christmas vacation and Spring break, the above rate would be pro-rated accordingly.
3. We realize that the Church is an older building and might not have some of the amenities a newer building might offer. We hope and trust that our flat-rate bid is competitive enough to more than make up for any cosmetic differences that might exist between our building and a newer one.
4. Use of the normal basement space, or other parts of the Church for additional school activities, e.g., parent-teacher conferences, student-parent-community gatherings outside of the normal Monday-Friday school schedule identified above, would incur an additional fee, agreed to by the Church and SMS, based on what part of the building was being used and the nature and timing of the event.
5. The terms of this Agreement will be in force for the September, '15 through June,



'16 school year.

Additional Considerations

- a. **Notice of Needed Repair:** The SMS will advise the Church on the first day noticed of any accidents to Church property that require repair. They will also timely advise the Church of any needed maintenance or attention to Church facilities or grounds.
- b. **Clean Up:** The SMS will accomplish a basic clean up the areas of the Church and grounds that they used at the end of each program day. Basic clean up entails pick up and disposal of any trash that might be lying around on tables, floors or chairs; returning all furniture to its start-of-day position and generally organizing the used space to what it looks like it did at the beginning of the day. The Church will clean the bathrooms daily and will do a major cleaning of the whole school use area at the end of each week.
- c. **Prohibition of Certain Items:** Persons are not allowed to have or use alcohol, tobacco, illegal drugs or fire arms while using the Church facility and grounds.
- d. **Medical Emergency/First Aid:** The SMS is responsible for contacting the appropriate public authorities in case of a medical emergency by one of their students, parents or staff while at the Church. The SMS is responsible for providing any needed first aid supplies for their use.



3. BRIDGE LOAN:

A. Provide Full Explanation of Loan Including Lender Information, Terms and Any Other Funding Requirements

The school has been in contact with two lenders willing to provide bridge funding for the period between when the school incurs expenses and the time the school starts and state school funds are available. The loan terms are attached.

A. Full Explanation of Loan



Page for bridge loan insert



4. TRANSPORTATION:

A. Plan to Ensure Equitable Transportation Options for Students from a Variety of Neighborhoods

Sequoia Montessori School intends on making every effort in providing options for students to attend the school from a variety of neighborhoods and demographic groups.

A. Plan to Ensure Equitable Transportation Options for Students from a Variety of Neighborhoods

Locate near targeted population: The most at risk population for transportation issues impeding enrollment are families with low incomes and/or no access to reliable private transportation, therefore locating the school in an easily accessed site is essential. As illustrated in our location search analysis, the school is planning to site centrally to a large population of low-income families. Recruiting most heavily from the neighborhood in which the school is sited should diminish transportation barriers.

Locate near elementary schools where students can use existing bus service: All but one of the locations are close to existing public schools, which would allow students access to existing school bus lines. If families select that option, Sequoia will work to establish a volunteer team charged with walking students between schools.

Carpools set up by parents at initial parent meeting: At the initial parent meetings, the school will work with parents to set up carpools, providing sign-up information in both English and Spanish. This is a good opportunity to involve parents from all groups in setting up a significant resource at the beginning of the school establishment. Care will be taken to anticipate and assist with cultural barriers.

Locate in area with good bus access: All five location choices have close-by public bus access. This assists both lower and higher income families in alleviating themselves of non-private transportation. As these are young students, we would anticipate a parent/guardian and child riding together to school. Sequoia would work with Salem Keizer Transit ride training staff to help parents new to bus service learn to navigate the bus system. For families who cannot use existing school bus lines, cannot access carpools and cannot afford a bus pass, the school will offer a monthly parent and child bus pass. This is budgeted for in both budgets.

Locate near other charter schools/preschools to pool transportation costs: Sequoia has researched contracting our own bus service. The current costs quoted for a bus that makes five pickups at central points would be \$29,833 through Salem Keizer Public Schools and \$444 a day through First Student, which is prohibitive at this time. If the school were to locate at the OSD site, opportunities may arise to collaborate with existing schools to purchase bus service. Once the final location is determined, Sequoia will further explore this option.



5. ENGLISH LANGUAGE LEARNERS:

- A. Staff or Volunteers Who Speak Other Languages for Family Education and Outreach**
- B. Additional Explanation of the Manner in Which ELL Will be Served**

A. Staff or Volunteers Who Speak Other Languages for Family Education and Outreach

Outreach and Student Recruitment

The Sequoia Montessori School Board recognizes the essential role outreach will play in student recruitment, especially for students who are English Language Learners and yield from historically underrepresented communities. Because Montessori has shaped into a more predominantly white, higher socioeconomic status form of early education, the Montessori Method may be unfamiliar to parents and families with children who are ELLs or come from higher areas of poverty.

Teachers will be required to participate outreach to diverse populations through Montessori workshops and training for parents and families with school-aged children. This will ensure that teachers are creating meaningful relationships with potential parents and have connection with our community members and potential Sequoia Montessori School families.

Compliant with State and Federal regulations, Sequoia Montessori School will address the needs of English Language Learners by administering yearly the English Language Proficiency Assessment (ELPA) for students who have been identified as Limited English Proficient (LEP) and English Language Learners through a Home Language Survey. For those identified children, teachers will develop a plan for language acquisition using research-based techniques and best practices for working with English Language Learners, noted in the paragraphs below.

Teacher Support for ELLs: The Hiring Process and Professional Development

The Sequoia Montessori School Board is committed to creating a supportive and inclusive environment for all learners. Through the teacher recruitment, interviewing and hiring process, preference will be given to candidates who are bilingual, have ESOL endorsements, and/or have successful experience working with English Language Learners in a classroom setting. In order to be considered for candidacy, applicants must address their experience and knowledge of cultural competence and inclusivity through application materials. The hiring committee will give preference to teachers who have experience working with diverse populations. Should the most qualified and best-fit candidates be hired to work at Sequoia, training opportunities will be provided in the areas of ESOL and cultural competency.

To ensure that each teacher is maximizing their impact in the classroom, training opportunities will be provided through ongoing professional development in the areas of English language development, ESOL, and cultural awareness, equity and inclusivity. Teachers will be encouraged to utilize social justice programming and professional development models designed specifically for Montessori Methodology, such as the American Montessori Society's Peace and Social Justice program (<http://amshq.org/>). The Sequoia Montessori School Board will also work with the Montessori Institute Northwest to provide teacher training to qualified candidates who wish to work in a tuition-free Montessori School, such as Sequoia.



B. Additional Explanation of the Manner in Which ELL Will be Served

Commitment to Serving English Language Learners

English Language Learners are of particular interest to the board of the Sequoia Montessori School. Maria Montessori developed the Montessori Method for children who were underrepresented in the traditional classroom setting. The board believes that Montessori should be true to its roots and available to all students, regardless of socioeconomic status, race, gender, cultural background, or other potential limiting factors. Currently, the Montessori model is only available in the Salem area through private preschools and kindergartens. This limits the students who are granted access to the model to children who come from a higher socioeconomic status and who have parents familiar with the Montessori Method. Our board will prioritize specific structured outreach to families with children who are English Language Learners, of low socioeconomic status, and who do not fall into the European/Anglo-Saxon ethnicity, since the current Montessori preschools in the Salem area are predominantly white students with English as their primary language.

The Montessori Method Addresses the Needs of ELLs

The Montessori Method meets the needs of English Language Learners through the guiding practices already established within the curriculum. Students in the Montessori classroom are constantly developing language as a part of the curriculum through observing demonstrations by the teacher and daily practice of speaking, reading and writing in the English language as they begin to develop mastery of each area of communication. Sequoia Montessori teachers will incorporate language acquisition forms and functions into daily activities through lesson planning, as required by the SMS board and administrator. Montessori is a natural environment for students to successfully acquire the English language through interest-based learning, low-risk lessons, and hands-on manipulatives.

Current research supports the Montessori Method as a successful tool in English Language Acquisition, and is discussed at length to follow. Garcia (2002) states that in order for a classroom learning system to be successful with any group of students, the programs must address different language groups, different grade levels, different subgroups within a class and different proficiency levels of English Language Learners. Buynitzky (2006) suggested that the Montessori Method addresses all of these needs within one classroom, based on its core values and philosophies. Some of the ways in which these program areas are addressed include the teacher using specific instruction, modeling the lesson, practicing correct classroom behaviors and academic expectations within the classroom, and then providing opportunities for students to practice their skills with hands-on learning resources, rather than language-based learning resources and experiences. This is especially important for the beginning and early intermediate English Language Learners, who may excel at a task which is hands-on, but struggle with a task which is language-based in nature.

Buynitzky further conveyed the connection of Dr. Montessori's philosophy as an inherent program designed to meet the needs of English Language Learners. Her article noted that Montessori teachers are trained to find learning styles which fit the whole student, and support the student as an individual. The Montessori method promotes students taking an active role in their education through inquiry-based learning in which they are free to make choices, resulting in joyous learners who thrive in the classroom.

Garcia (2002) suggested that teachers who are teaching successful ELL students are learning about the needs of their students and finding multiple teaching styles to fit learning styles. The



Montessori method is a natural choice for teaching ELL students in the classroom as it offers a variety of methods to fit different learning styles.

Garcia also addressed the critical role of the teacher to enhance the school experience for all students within a multicultural classroom. Children must be interested in their education, they must see some purpose behind academics, and most importantly, they must feel the desire to learn in order to be successful. According to Buynitzky, children who are given choices in their education will choose to work on what interests them and brings them joy at the time. Therefore, it is important for teachers to not only allow students time to explore inquiry-based learning, but also offer the materials which are needed in order to do so.

Montessori education is based on this principle of choice and encouraging a child's exploration and interests within specific educational boundaries, namely curriculum standards. When children in Montessori classrooms are given choices, they become joyful learners, eager to participate and investigate. They take on the roles of decision-makers, learners, and, often times, the role of the teacher. These choices empower the child to excel at what they do well, and once they have mastered those skills they are able to teach others and then begin mastery of a new subject with confidence.

The Montessori method addresses English Language Learners in a new manner: capitalizing on their strengths and developing skills to help them grow. It is essential to the method to plan lessons which are easily accessible to students of all language backgrounds. Lessons at the Sequoia Montessori School will be designed to be easily demonstrated by the teacher, easily replicated by the student for practice, and would provide immediate feedback for students. Montessori teachers traditionally explain a lesson using minimal language, demonstrate the lesson using the lesson's hands-on materials, then show an example of success, and finally encourage students to try the lesson on their own or with a partner. This allows students of all language levels to fully understand the purpose and desired outcome of the activity.

The Montessori classroom is a natural environment to incorporate both **GLAD** (Guided Language Acquisition Design) units and SIO (Sheltered Instruction Observation Protocol) strategies. The GLAD method is Montessori in nature, providing low-risk lessons with immediate feedback for students that can be practiced over and over by a student until mastery is gained. SMS will require GLAD training for teachers during the first two years of opening. Teachers will use GLAD to incorporate thematic units, a key strategy of the Montessori Method.

Montessori encourages the development of English Language Learners by supplying hands-on materials in a low-risk environment where students can check their understanding through immediate feedback. They do not need to wait for the teacher's comments or for returned corrected tests, delays which often lose the meaning for students. Students are able to work with others or independently on a project which they enjoy doing. The students are not learning from a book, which may have too much language, but are learning from the models, answer keys, mini lessons with the teacher, and through working with peers, if they chose to do so. This motivation for learning is central to the acquisition of a second language (Cummins, 1991). This self-directed, inquiry-based style of learning improves educational persistence in students, supporting students' success in the academic system.

The Montessori Method stresses that in order for children to be successful, they must learn at their own pace and enjoy their classroom activities. SMS will encourage children to help choose classroom units based on their personal interests. SMS will help all students, particularly ELL



students, find joy in the classroom instead of the dread or fear which may have overwhelmed ELL students in the past. Sequoia Montessori School will offer ELL students the chance to be successful in a safe environment by lowering the students' affective filter (Krashen, 1978), resulting in the acquisition of not only conversational English, but also the language of academia. Cummins (1991) refers to these types of language as BICS, Basic Interpersonal Communication Skills (conversational English language), and CALP, Cognitive Academic Language Proficiency (academic English language), both of which second language learners must acquire in order to be successful in their education.

With the educational program outlined above, the Sequoia Montessori School will be consistent with all of the goals outlined in Oregon Charter School statute (ORS 338.015).



6. DIVERSITY:

- A. **Outreach to the Community and Non-Montessori Families**
- B. **Recruitment Plan for Hiring Staff Who Reflect the Demographics of the Community and Targeted Student Population**
- C. **Additional Explanation of How the School Will Develop or Use Culturally Responsive Curriculum to Meet the Needs of a Diverse Student Population**

Statement of Equal Opportunity:

The goal of **Sequoia Montessori School** is to provide authentic Montessori education by highly qualified staff to any child in our community. We are committed to the principle that our educational facilities, activities, and employment opportunities shall be offered without regard to race, color, religion, sex, national origin, marital status, veteran status, actual or perceived sexual orientation, gender identity, gender expression, or status with regard to pregnancy, disability or age.

Sequoia is committed to adhering to the letter and spirit of all federal and state equal opportunity and civil rights laws, including but not limited to Title IX of the Education Amendments of 1972, Section 504 of the Rehabilitation Act of 1973, Title VII of the Civil Rights Act of 1964, the Age Discrimination in Employment Act of 1967 (ADEA), the Age Discrimination Act of 1975, the Americans with Disabilities Act (ADA) of 1990, and their implementing regulations.

A. Outreach to The Community and Non-Montessori Families

See also: [7B. A plan to educate and recruit families from targeted neighborhoods about Montessori option](#)
[7C. A plan to sustain parent and family education and outreach once the school is operating](#)

Establishing a Diverse School Community Starts with the Board: In all Board selection and hiring processes, SMS encourages applications for employment and Board membership from persons who are members of groups that have traditionally been underrepresented based on race, color, national origin, gender, age, or disability. The statement of Equal Opportunity is highlighted on the school website and will be in all advertisements for employment and Board recruitment. Board member recruitment from minority populations within Salem will continue, with the expectation that the Board membership reflect the demographics of the community.

Action plan for Board recruitment outreach: The founders recognize that they will have to actively invite a more diverse membership on the Board and have crafted a plan to do so. The board is very sensitive to making sure to invite new members as active and interested participants, rather than just trying to fill a quota. To date, after analyzing the current makeup of the Board, the school has made a plan for recruiting new members for skills as well as demographics. By the Fall of 2014, before the hiring of staff, the Board demographics will be more reflective of the community. An important part of the Board makeup is continuing the balance of parents and community members. The bylaws require the Board to have no more than fifty percent of either group. The Board is currently recruiting from community members with diverse backgrounds. These community members will be specifically selected to help in the outreach to the Hispanic community, since the Board has identified that as a need. In addition,

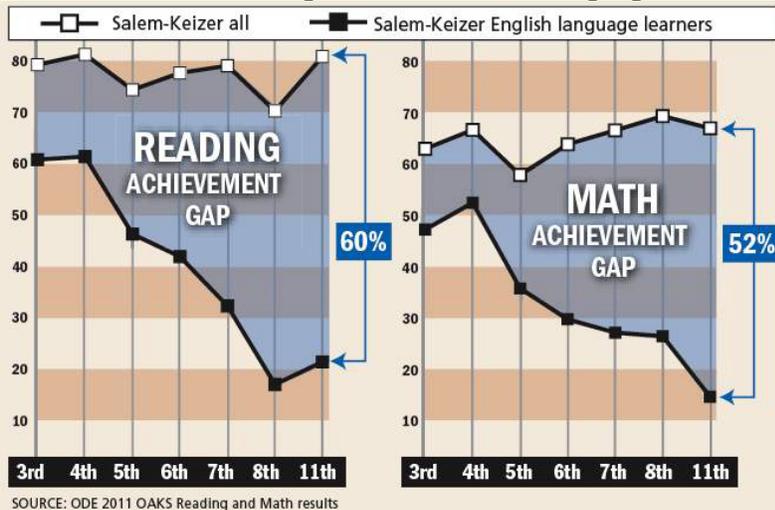


the Board will hold at least half of the parent slots for parents from diverse backgrounds after the initial registration. This will ensure continuity and commitment once the school starts.

Plan for sustaining diversity of the Board: By studying other charter school boards, we know that initial efforts to be inclusive often lag after the first years. A permanent Board committee will focus on sustaining diversity at all levels of the school. Parents may move on to other schools, community members may drop off the Board. Often, members recruited only for their diversity feel isolated and underused and drop off. The Board of Sequoia plans to invite Board members for their skills and use those skills as a way to keep Board members engaged. The skills that Board members are expected to contribute will be explicitly identified in the initial invitation to join the Board so that both the Board and the member are clear on their commitment and value they bring. Continuing Board development and training in both Montessori and cultural competence will be aimed at creating a sustained inclusive environment. In addition, parent members will be encouraged to recruit from their network to find a replacement for their seat before they plan to vacate. The Board operation will be structured to increase the ability of parents from diverse backgrounds to participate. This includes having meetings at times and places that accommodate work schedules, having childcare available for meetings, and providing training and materials in accessible ways for members.

Achieving economic, cultural and racial diversity among students: The members of the Board believe that creating a culturally and racially diverse school is possible and essential for the creation of a true Montessori public school. Salem is the capital city of Oregon with a population of over 150,000. The central downtown area is home to three of the largest employers: Willamette University, Salem Hospital and the state government. There are currently 42 public elementary schools in the district, though none are located in the immediate downtown area where the school ideally would be located, and none offer a traditional Montessori education. Thirty-nine percent of students in the district are Hispanic; nineteen percent are in the English Language Learner program. Fifty nine percent of children are Title I eligible and more than half of Salem-Keizer's student population is considered to be living in poverty (Salem-Keizer school district website, 2013 statistics).

The graph below shows a significant widening achievement gap as students from low income and ELL backgrounds move through grade levels in Salem Keizer:





The Montessori curriculum, with its emphasis on empowering the student to be the leader in his or her own education, helps eliminate the achievement gap evident in Salem Keizer schools.

With Montessori education, students no longer are left to rely on the chance that they will have the most involved parents and resource rich schools to keep them going through middle and high school. From the beginning, a self-reliant, internally motivated culture is instilled in the Montessori child so each can forge their own path and has the academic tools to do so. This is why Montessori education is particularly useful for children who come from populations that have traditionally had difficulty staying on track for graduation and post-graduation success. The core of Montessori teaching gives students an outlook and practice in self determination.

Action plan for community outreach:

Location: Location can be the first barrier to a diverse school population. Lower income and minority families have a more difficult time accessing transportation necessary to attend out-of-neighborhood schools. Sequoia intends to locate in central or northeast Salem, and focus student recruitment on the surrounding neighborhood. The locations being considered for the school all serve neighborhoods with higher poverty and lower achievement results than the state average (see location information).

Information: Lack of information can be the second barrier for attending a charter school. Families from higher income brackets are often more able to access information about charter options. In Salem, the Montessori preschools are all private and serve predominantly white, middle and upper income level families. In order to create a more diverse school population, Sequoia will focus its outreach predominantly on lower income and Hispanic families. The school has already created a bilingual website and prints all marketing materials in Spanish and English. These efforts, though essential, are not enough. We know that face-to-face outreach is what draws families to a charter school. Parents need to understand the Montessori model and how it would enhance their child's education before signing up for something different from the "normal" choice of their neighborhood school and parents who have not had their child in Montessori preschool need even more support to understand the opportunity Sequoia might be for their child. To fully support sustained recruitment of families from diverse backgrounds, we have developed three levels of outreach: marketing, information session and preschool parent workshops.

Marketing the school: The first level of outreach is a comprehensive, welcoming print and web campaign. Sequoia has already developed a bilingual English and Spanish website with photographs of children with diverse ethnic and racial backgrounds. All print materials have been and will continue to be produced in both English and Spanish. Care will be taken in the creation of materials and presentations to be inclusive and accessible to all potential parent audiences.

In order to reach families from low income and non-English speaking families, it will be important to reach them where they are. The school will collaborate with agencies such as Family Building Blocks, Head Start, the Salem Keizer Coalition for Equality, AC Gilbert House, Chemeketa Early Childhood Development Center daycares, summer camps, the YMCA, the Salem Public Library, and the Kroc Center to bring information about the school to the community. Other opportunities the school will use to reach out to parents include an informational booth at the MS Sales Saturday market (which is attended by hundreds of



Hispanic families each week), neighborhood “Get to Know Montessori Nights” in neighborhoods surrounding the school and summer City of Salem Park programs. In all these outreach opportunities, bilingual Board members, staff and volunteers will be present to fully communicate with potential parents.

Information sessions: To make our commitment to diversity in recruitment ongoing and sustainable, we have written into the Sequoia Teachers’ and Teaching Assistants’ job descriptions, in the “Essential Job Functions” section, that teachers will work with the Board to assist with recruitment and outreach activities including two workshop presentations per year to families interested in Montessori for their children. These sessions would be held at Head Start and community center locations in the targeted community. During these “Get to Know Montessori Nights” at community locations, parents would be able to ask questions, see materials, try activities, and learn more about the school and Montessori. Follow-up school open houses would take place after the initial information sessions. Bilingual speakers and the availability of translators will be key for these events.

Preschool parent workshops: In partnership with Salem Keizer Coalition for Equality (SKCE), the school already developed and field tested a workshop to educate Spanish-speaking parents about Montessori education with goals of providing an introduction to the Montessori method and educational tools to parents who did not have a previous understanding or access to Montessori. Curriculum was developed in Spanish and educational tools were created and given out during the workshop. The families then practiced using these techniques and materials at home with their preschool children. As part of the intensive pre lottery outreach program, these workshops would be given again to Spanish-speaking parents who are potentially interested in the school for their children. These would be scheduled for the fall and winter ahead of the lottery in March of 2015. Having adequate information and a chance to interact with school staff will increase the likelihood that parents choose to register for the school and that their child’s placement is successful. The partnership with a well established community group has helped the school craft culturally appropriate and accessible outreach material (see attached letter from Salem Keizer Coalition for Equality).

Parent involvement: Another barrier to sustained diversity can be a perception of not belonging at a school. Parents who do not feel a part of the community or valued as contributors will drift away and not encourage their friends to enroll their children. It’s vital that Sequoia provides leadership opportunities to parents so they truly are a part of the school. The Board recruitment process stated above describes one of those opportunities.

In addition, for school events, fundraising, and outreach activities, care will be taken to consciously over-recruit from the parents of lower income or minority students. Attention to providing culturally appropriate and accessible options for meaningful involvement will be necessary. In addition, the school will work to remove obstacles like child care for younger children, transportation or access to technology by providing these to the highest degree possible and advertising their availability.

After school care option: An affordable option for after school care will be provided for working parents. We understand that working parents must often rely on after school care and want to assure parents considering the school. Therefore we will implement a sliding scale after school care program. The locations we have identified each have low cost close by after school care programs that the school can potentially partner with.



Plan for Sustaining Diversity in student population:

The above practices are designed to continue beyond the first year. We know from other successful Montessori charter schools that after the first year there is typically a waiting list and no need to actively recruit to fill seats. However, it is important to keep focusing recruitment on under-represented families in order to make sure the lottery yields a diverse class. Nurturing diversity is so vital to the school's plan that we have created a subcommittee of the Board. That committee would be charged with managing the outreach program each year so that it is something that happens and is evaluated.

The culturally responsive curriculum inherent in Montessori education should help nurture this long term focus, but we realize that putting structures in place in both Board membership and staff hiring and expectations is the only way to ensure sustained diversity.

In addition to continuing the above focused outreach activity, the ideal would be to partner to create a Montessori preschool program for low income families. Through this process we have developed a relationship with local family advocacy groups and Head Start programs. Combining Head Start funding and the all day kindergarten funding that may be available in coming years would allow the ideal Children's House model of 3-6 year olds to feed the elementary program. The locations at the Oregon School for the Deaf and the Korean Church, both with nearby Head Start programs, make this a possibility.

B. Recruitment Plan for Hiring Staff Who Reflect the Demographics of the Community and Targeted Student Population

Effectively recruiting and retaining staff from diverse backgrounds requires intentional focus and multilevel efforts.

Action plan for outreach:

The Board will actively recruit teachers and Board members from underrepresented groups. The school plans to give preference in the hiring process to Montessori teachers with second language backgrounds, experiences with other cultures, training in ESOL and/or Special Education. A statement of the hiring preferences and the targeted population of children to be served will be highlighted in each recruitment advertisement (see attached job descriptions).

Diversity is emphasized, as well as competency in strategies to serve a diverse population. As explicitly stated in the job descriptions, staff will be expected to help in recruiting families by speaking at public information sessions. The school expects a much more community involved staff than most public schools and has crafted its expectations to reflect that.

The Board will recruit teachers from Montessori training institutes in major cities with a more diverse pool of qualified teachers. We will recruit through the Association of Montessori Internationale as well as accredited educational licensure programs. We already have a presence at the Montessori Institute Northwest Job Fair for Elementary Trained Guides with MEDs in conjunction with Loyola University in Baltimore Maryland. The Montessori Institute Northwest has a program that offers grants for people who need training and are interested in working in public non-tuition based Montessori schools such as our charter. We would be able to offer this as an option for Montessori training to otherwise qualified applicants. Additional options include a three year commitment to the school in which Sequoia would pay for any (additional) Montessori training. Funding for providing Montessori training to highly qualified bilingual teachers will be written into the Federal grant application.



Plan for sustaining diversity of the staff:

As with the Board, initial charter school efforts to have a diverse staff often decline after the initial years. The school realizes that a commitment to permanently inclusive community will require devoted effort and resources. In addition to the purposeful recruiting of a diverse Board the school will:

- Provide support for ongoing training to help administrator, teachers and assistants continue to improve cultural competencies
- Prioritize experience with diversity and intercultural communication in hiring
- Recruit from other states
- Send our administrator to conferences or national Montessori meetings to continue contacts with more diverse pools of educators
- Build in salary rewards for staff who expand their multicultural competencies and language abilities
- Have board members from diverse communities provide mentorship to staff recruited to the school
- Actively recruit strong, bilingual, bi-cultural teachers and assistants who are not Montessori trained to join the school while getting Montessori training

C. Additional Explanation of How the School Will Develop or Use Culturally Responsive Curriculum to Meet the Needs of a Diverse Student Population

Focus on knowing the student: Montessori education's cultural responsiveness is achieved through its focus on the individual child. Teachers are trained to first observe and get to know the individual child and meet them where they are. Understanding the child is core to being able to teach them effectively. Montessori teachers are emphatically encouraged not to assume anything by the child's looks or name or accent.

Time is explicitly set aside both before the school year begins and during the school day to observe and learn from the child. In addition, since the families will know their enrollment status at the school beginning in March, each family will meet with the staff before the school year begins, both in one on one and group events. The grouping of children in multi-age classrooms over three years also helps the teacher and the students get to know each other. The small school size also allows for truly getting to know each child holistically.

This knowledge is seen as essential to knowing how to teach the child. The effectiveness of the teacher is tied to their ability to learn who the child is to understand how the child learns. Teachers need to learn what students know and have experienced so they can use it to scaffold new concepts. This ties into the use visual and manipulative aids and isolating one new concept or level of difficulty by building on the known to support learning.

Respect for the community: Establishing and nurturing a community at the school is central to the Montessori curriculum. Lessons of grace and manners begin with the purpose of instilling a respect for all members of the community. Manners are practiced as a way to bond the community with thoughtful courtesy, not as a way to distinguish proper from improper. For example, a common early Montessori lesson is about greetings.

Explicitly considering, naming and teaching the words and body language to openly communicate with others allows children who have grown up in different cultures the structure to comfortably interact. It is also an opportunity to explore different ways greetings are performed



in different cultures. This seemingly small gesture opens up communication that otherwise might be limited from the beginning for lack of common understanding. As the community builds, more complex cultural respect and competency grows upon the foundation.

Materials: In the Montessori classroom, materials are very carefully selected and only present if the teacher has a clear purpose. Items are examined for their learning potential and for their impact on those in the classroom. This may seem obsessive to some, but the prepared environment is the base of managing the self directed classroom. Choosing the materials to be respectful and reflective of all the cultures is a challenge Montessori teachers continually review. Fortunately, since Montessori is an internationally used method, appropriate materials are available reflecting many cultures. The school has already purchased some materials and will continue to make purchases of materials, including practical life and art materials that reflect a worldview. Attention to who is pictured in books or what kind of fruits and vegetables are on botany cards to make sure they are inclusive of all populations is vital to the true education of all the children, not only those who may be in the minority.

Curriculum: The Montessori curriculum is predicated on starting where the child is and building out from there. Early years are focused on the child home and family life. By elementary, children wonder where they are in their community. Montessori lessons exploring the local community, understanding geography, understanding the structure of language all offer opportunities for culturally responsive teaching.

As the ELL section details, opportunities for language development start with where the child currently is and builds from there. Differences in languages spoken are not seen as a deficit, but an asset. As students are allowed to learn from each other, the teacher looks for ways each child can be the expert. Cultural diversity presents many opportunities for this. Encouraging a child to bring her own and her family's expertise into the classroom and using that to teach other children builds a deep sense of self esteem in the "teaching" child and engenders respect for others in the "learning" child. The openness of the curriculum to letting a child process information and work as far into a subject as he wants allows more of these opportunities to come to fruition than a class pushed for time and teacher centered.

Support for diverse learning:

Montessori has been identified as a sound method for diverse learners. Students are Empowered to take control of their learning, having choice with appropriate guidance and materials to support the learning. By both learning from peers and teaching peers lessons are aurally and actively reinforced. Small groups where ability and interest not age determines content helps students who move through material at different rates. The physical materials, designed to move learners from the concrete to abstract matches the brain development of the early elementary years and offers reinforcement to those who need hands on connections to learn.

The many hands on learning materials make reading in second language not an impediment to learning, The classroom is set up to allow for movement, children choose their area to work with varied learning environments available. The three year classroom allows the students, teacher and assistant to truly get to know each other across multiple years, so they can be sensitive to each others learning needs. The members of the classroom are trained for constant observation and adjustments, students use a portfolio/notebook approach to show mastery rather than only relying on summative tests.



Continual improvement: Montessori teachers are trained in continual self reflective practice. They are rightfully skeptical of generalizations about cultures applied to the individual. The school takes very seriously the requirement of participation by the staff in parent education sessions and activities to get to know the students' families. The school structures are set up for continual professional development, mentoring and evaluation of teachers to constantly focus on how individual students are being served.

Support for Students with Special Needs

Compliance with the law: In accordance with Oregon state law, the school will not discriminate for enrollment based on a student's disability. The school has already conferred substantially with the Salem-Keizer School District and outlined a plan for students with disabilities who are admitted in the school lottery (see appendix J).

The Sequoia Montessori School board has met with the Salem-Keizer School District Student Services liaison, Linda Felber, to ensure compliance with all federal and state laws, as well as district policies for students with special needs.

Sequoia Montessori School will fully comply with state and federal regulations governing special education. If a new special needs student comes into Sequoia Montessori School with an IEP, a team meeting will be held with staff and parents to determine how best to meet the child's needs in the new school setting. The school will send a student list to the Student Service Department within 10 days of the lottery or enrollment for each child in order to identify and prepare to provide any needed services before the start of school.

Extra assistance will be provided to children on Individual Educational Plans (IEPs). There will be ongoing consultation between teachers and staff. Only when necessary direct services in the form of a "pull-out" from class will occur. Generally, students will be able to participate in the classroom activities because the Montessori educational model is well suited to children with different needs and learning styles. There is an emphasis for all children to work at their own pace, using an individualized program, and multi- sensory materials. If necessary, Special Needs children who attend Sequoia Montessori School will have their individual learning contracts modified to comply with requirements of their IEP. As per State law, the Salem-Keizer School District will be responsible for the extra services provided to special education students.

Special Needs Students as Independent Learners

Montessori classrooms help children with disabilities make choices and become independent learners in many ways. In a Montessori classroom, children may choose any material for which they have had a lesson given by the teacher. The children's activities, therefore, are not predetermined by a teacher's lesson plans. Children with disabilities are afforded the same opportunities to choose materials each day as their typically developing peers.

They make truly meaningful choices many times each day. This also fosters independence, because as early as a child's second day, she is encouraged to choose from any of the materials presented the day before. With her first choice, she is taking a step toward becoming an independent learner. Independence is also facilitated by offering children a long uninterrupted block of work time daily, freeing them to truly experience this independent learning style. Work in a Montessori classroom is introduced to children based on individual readiness rather than the average chronological age of classmates.



When a child works on an individual need or skill that is very different from the needs of his peers, he or she is not set apart as different or viewed as an extra responsibility. Children with disabilities can work with their friends, or alone, as the skill being learned demands. The sequence of a child's lessons may also vary without interrupting the flow of classroom work. Children with disabilities may, when necessary, pass through a skill sequence in a different order or at a different rate than a typically developing peer.



Administrator Job Description
Reports to: SMS Board
Official Title: Administrator
Months: 12

Essential Job Functions

Under the direction of Sequoia Montessori Board of Directors, the Administrator is responsible for supervising the Sequoia Montessori Charter School (SMS) in its entirety, providing educational leadership for the students and staff members consistent with the goals of the community. The Administrator will cultivate an environment that fosters the success of all students by facilitating the development, communication, implementation and evaluation of a shared vision of excellence in teaching and learning, which is firmly grounded in the Montessori philosophy. Functions of this position will vary and include: establishing a climate conducive to learning, defining roles, planning and coordinating programs, effecting change, and decision-making based on and guided by Montessori principles.

Minimum Qualification Standards

Knowledge, Skills and Abilities

Thorough knowledge of public school systems, general understanding of Oregon Department of Education policies and procedures, and knowledge of state and federal regulations and laws. Knowledge and understanding of the goals of Montessori education, curriculum, instruction, organizational patterns, school operation and pupil services. Ability to effectively articulate expectations, vision and essence of Montessori education to students, staff, and community members. Ability to stimulate community support of the school. Demonstrated competence in staff selection, training, supervision and evaluation. Demonstrated problem-solving skills and ability to act effectively and collaboratively under stressful circumstances. Ability to motivate, encourage, and work with staff to ensure outstanding performance as well as high morale. Excellent oral and written communication skills and interpersonal skills. Ability to provide successful outreach to historically underrepresented populations required.

Education, Training and Experience

Master's degree from an accredited college or university with an emphasis in supervision, educational leadership, early education and/or elementary school curriculum. Experience leading a Montessori school or program, and a track record of successfully motivating staff and managing resources toward shared goals service diverse learners. Human resource management skills and experience, including staff management, professional development oversight, recruitment, evaluation. Minimum of five years teaching, administration or leading a Montessori school or program. Experience working collaboratively with teachers, parents, students, community organizations, board(s), as well as strong partnership-building skills. *Other combinations of applicable education, training, and experience which provide the knowledge, abilities and skills necessary to perform effectively in the position may be considered.*

Certificate and License Requirements

Meet Oregon certification requirements or be eligible to register with TSPC.

Special Requirements

Frequent overtime or night work required. Work beyond a 40-hour week and attendance at evening and weekend meetings, as required. Ability to respond to school requirements at any time.



SMS is a school designated to serve the entire community. Hiring preferences will be given to candidates with demonstrated experience in diverse cultural settings. Preference will also be given to those fluent in Spanish with an ESOL endorsement or ESOL experience.

Examples of Duties and Responsibilities:

- Ensure the effective and efficient implementation of the educational and instructional programs in compliance with the Montessori philosophy, the school's charter, and applicable local, state, and federal regulations.
- Monitor curriculum implementation to ensure that the appropriate content and sequence are followed, Common Core Standards are met, and ESOL student needs are addressed.
- Ensure that SMS policies and procedures, as well as state and federal laws, are followed.
- Establish a safe, positive and collaborative school climate, maintaining staff harmony and being an advocate for the school's children/students.
- Coordinate the development and implementation of a culturally competent school disciplinary policy that is consistent with the SMS policy on Student Rights and Responsibilities and Oregon State Law.
- Work with teachers, the Board, and community members to ensure the appropriate integration of programming for all students and families.
- Identify instructional and support staff training needs; develop and implement a training plan to meet those needs.
- Provide professional development consistent with program instructional outcomes and student learning needs. P.D. should also address cultural competency and ESOL needs.
- Manage the school's fiscal resources responsibly, including the development, implementation, monitoring, and timely reporting of both revenues and expenses.
- Ensure content alignment with the Oregon State Department of Education and Common Core Standards.
- Supervise and evaluate staff based on the SMS established professional growth systems and Montessori pedagogical standard.
- Other duties as assigned.



Lead Guide/Teacher Position Description
Reports to: Administrator, SMS Board
Official Title: Lead Teacher
Months: 11

Essential Job Functions

The Sequoia Montessori Charter School (SMS) Lead Teachers are responsible for leading the implementation of the Montessori instructional program in a lower elementary classroom and will work in collaboration with their partner teachers and the SMS Administrator to ensure that all students achieve the outcomes outlined in our charter contract.

Minimum Qualification Standards

Knowledge, Skills and Abilities

Strong understanding of Montessori methods and ability to effectively integrate other best practices into the Montessori classroom. Understanding of academic development and psychological development in children. Ability to work with students to build individual learning plans which identify zones of proximal development and build upon prior knowledge, experience and interests. Ability to utilize multiple forms of assessment to inform and drive instruction. Passion for teaching and working with students from urban communities, with specific knowledge and understanding of the needs of students from diverse backgrounds, cultures, and languages. Driven team player and life-long learner who is able to provide mentoring and leadership. Enthusiasm and commitment to participating in a cooperative effort to launch SMS, committing to the vision, mission and guiding principles of the School. High ethical and professional standards, excellent communication skills, computer literacy skills, excellent time management, organizational, and follow-up skills, high sense of commitment and ability to successfully contribute to and work with a team.

Education, Training and Experience

Bachelor's degree (BA or BS) from a four-year college or university and at least three years of successful teaching in age group, Montessori classroom preferred. Appropriately credentialed through TSPC with an Oregon teaching license or another state teacher credential which can be transferred to Oregon. Elementary Montessori certification and training with at least one year experience, (student teaching or practicum may count towards one year). Experience teaching and working with English Language Learners.

Certificate and License Requirements

Meet Oregon certification requirements or be eligible to register with TSPC.
Able to obtain First Aid/CPR certification.
Able to pass state and federal background checks.

Special Requirements

Some overtime or night work required.
SMS is a school designated to serve the entire community. Hiring preferences will be given to candidates with demonstrated experience in diverse cultural settings. Preference will also be given to those fluent in Spanish with an ESOL endorsement or ESOL experience.

Examples of Duties and Responsibilities:



- Establishes an inspiring Montessori classroom setting that is organized and engaging, with culturally competent and relevant systems and procedures that manage student behavior, movement and learning.
- Takes leadership in guiding supporting teacher; ensures that all adults are maximized in the classroom.
- Assists with educational and recruitment outreach to historically underrepresented populations including English Language Learners and children from diverse backgrounds through facilitation of two annual outreach recruitment workshops.
- Establishes a powerful classroom culture where students have high expectations for themselves and for others, are self-motivated and self-directed, have pride in themselves and in their community, have a strong understanding of cultural differences, care about themselves and their community and value and love learning.
- Develops and implements individualized learning plans in addition to small and whole group lesson plans and classroom activities consistent with SMS instructional guidelines.
- Assesses students regularly in accordance with SMS guidelines; examines student assessment data and refine learning plans to differentiate instruction for each student.
- Collaborates with SMS team members to improve own and others' instructional practices; shares best practices.
- Actively participates in all professional development activities.
- Provides students and their families with regular and timely information on classroom activities and student progress; finds ways to involves parents, guardians, family members in students' education.
- Identifies unique student needs and collaborates with other team members and outside service providers to diagnoses and address learning differences and challenges.
- Demonstrates knowledge and support of SMS's mission, vision, value and diversity statements, standards, policies, procedures, operating instructions, confidentiality standards, and code of ethical behavior.
- Other duties as assigned.



CAPACES Leadership Institute

Instituto de Liderazgo CAPACES

www.capacesleadership.org

July 9, 2013

Dear members of the Salem Keizer School Board,

My name is Jaime Arredondo. I've been living in Salem for over 20 years and went through this district's educational system. Currently I work as the Director of Special Projects for the CAPACES Leadership Institute, a non-profit organization that's working to develop leadership in the Latino communities of the Mid-Willamette Valley.

I am full support of the Sequoia Montessori School. As a former ESL student I believe it's critical to have schools that support English Language Learners and those students wishing to acquire a second language. The elementary curriculum of the Sequoia Montessori School strongly emphasizes language.

At the Sequoia Montessori School the development and growth of English Language Learners will be fostered primarily through inquiry-based learning using manipulatives. This hands-on approach will provide ELL student the opportunity to learn concepts using little language, solidify their understanding of the concepts, and then move on to gaining the English language needed to express their ideas verbally. This is a proven method that will be utilized across the school's curriculum.

I also want to applaud the board members of the Sequoia Montessori School for the outreach work they've done in the Latino community to assure the school is representative of our Salem community. They've demonstrated a high level of cultural competency and most of all a caring attitude for the underserved, such as the farmworker Latino community. I'm honored to be a partner in their work. Please support the establishment of the Sequoia Montessori School. Thank you.

A handwritten signature in black ink, appearing to read "Jaime Arredondo", is written over a light blue horizontal line.

Jaime Arredondo
Director of Special Projects
CAPACES Leadership Institute
503-302-6549



July 9, 2013

To whom it may concern,

This letter is in support of the Sequoia Montessori School federal implementation grant application.

The Salem-Keizer Coalition for Equality is a nonprofit organization with a thirteen-year history working for education reform and creating programs for English Language Learners and Latino students and their families. We have a Community Center on Portland Road in Northeast Salem. We offer 50+ workshops in Spanish for parents at Salem-Keizer schools each year, develop parent leaders from the community we serve, advocate for additional programs and resources for families, and provide youth programs. There are over 5,000 families in our database and we annually provide services for 1,000+ individual adults and their children. We are committed to improving education outcomes for English Language Learners and Latino students and are excited at the prospect of a Montessori Charter School as another resource in the community.

We know that the school will "walk the talk" of outreach, because they have collaborated with us to do advanced outreach to parents from low income Spanish speaking neighborhoods. In the past year, we have had the opportunity to educate the NE Salem Spanish-speaking community members about Montessori and the possibility of a new charter school. This is a report on our activities.

- Master Teacher Sara Czaky researched the Montessori philosophy and investigated resources available in Spanish in late May and early June.
- We purchased Montessori supplies to add to our childcare and magnetic letters to give away to families in mid-June. We focused on materials that foster literacy or allow for life-like play (wooden family sets, puppets). Our intent was to purchase some lower cost items to give to parents and to add others to our childcare so we could continue to use the materials with children. We purchased 120 bags of two inch magnetic letters to distribute with Spanish brochures about Montessori.
- Sara planned a two-hour training on Montessori philosophy and specific techniques for our 19 member parent team. This included providing food and childcare for the parents during the meeting.

P.O. Box 4296, Salem, OR 97302

www.skcequality.org



- We provided a two-hour training for our 19 member parent team with food and childcare on 6/29/2012. After an hour presentation on the history and philosophy of Montessori, and the planning process for the Charter School, participants broke into small groups and worked with different manipulative devices (foam dice with letters, egg timers, peg boards, plastic letters, and magnetic letters) and created activities to present to the group. We captured these ideas and created half-page instruction sheets to include with the activities for our childcare providers and parents receiving items.
- We incorporated Montessori techniques into the childcare and family activities as part of our 2012 Summer Oral Language Development program. 24 participating families listened to a presentation on Montessori on July 11th and received bags with magnetic letters (upper and lower case), a book on the five senses and a brochure on Understanding Montessori. The bag also included instruction sheets with ideas of how to use the materials. We explained that there may be a Montessori Charter School opening in Salem.
- We provided brochures on the Montessori philosophy to 30 parents with young children at our Friday family night at Northgate Park. We also gave the families bags of magnetic letters and instruction sheets to use with the letters. We incorporated creative activities into our program based on a list of Montessori activities.
- We purchased 400 brochures in Spanish titled "Understanding Montessori" instead of making a new handout. We found the brochure to be high quality. We distributed the brochures to families at our Center.
- Our outreach plan is at the end of this document.
- SKCE is prepared to label and mail prepared packets provided by the Charter School for our list of 5,000 Latino families in NE Salem.
- We remain available to advise and provide updated labels as needed by the planning team.

Please do not hesitate to call or e-mail if you require additional information.

Sincerely,

A handwritten signature in black ink, appearing to read "Eduardo Angulo".

Eduardo Angulo
SKCE Executive Director
503.930.9323
eangulo@skcequality.org



7. COMMUNITY SUPPORT:

- A. **Current Evidence of Community Support for the School; Must Include Actual Numbers of Prospective Families and Demographics if Possible**
- B. **A Plan to Educate and Recruit Families from Targeted Neighborhoods about Montessori Option**
- C. **A Plan to Sustain Parent and Family Education and Outreach Once the School is Operating**

A. Current Evidence of Support and Demographics

After receiving notice from the State that Sequoia Montessori would best be served by postponing opening from 2014 to 2015, the school sent out a new survey asking supporters about their interest in sending a child to Sequoia in fall 2015. By fall 2015, some families who have previously expressed interest in Sequoia Montessori will have children either who ‘age out’ or who attend other schools. With that, Sequoia thought it prudent to recheck support.

Previously identified supporters and local preschool lists received the initial interest survey electronically. Achieving demographic anonymity occurred by providing families who filled out the initial survey the demographics survey separately. Survey distribution took place from 03.11.14 to 04/05/14 with 63 families returning interest surveys and 41 returning demographic responses.

First are the demographic responses: race, ethnicity, household income, and documented disability. Second are the interest responses: children’s ages and the likeliness of enrollment.

Demographic Responses:

	Race		Ethnicity	
	Count	Percent	Count	Percent
American Indian or Alaskan Native	1	2.44%	1	2.44%
Asian or Pacific Islander	5	12.20%	3	7.32%
Black or African American	0	0.00%	0	0.00%
Hispanic or Latino	1	2.44%	2	4.88%
White / Caucasian	37	90.24%	38	92.68%
Other (please specify)	0	0.00%	2	4.88%
Total	41	100%	41	100%



Household Income	Count	Percent
\$0-\$24,999	2	4.88%
\$25,000-\$49,999	3	7.32%
\$50,000-\$74,999	7	17.07%
\$75,000-\$99,999	11	26.83%
\$100,000-\$124,999	8	19.51%
\$125,000-\$149,999	3	7.32%
\$150,000-\$174,999	2	4.88%
\$175,000-\$199,999	1	2.44%
\$200,000 and up	3	7.32%
Other (please specify)	1	2.44%
---Prefer not to answer		
Total	41	100%

Child Documented Disability	Count	Percent
Yes	1	2.44%
No	40	97.56%
Total	41	41

Interest Responses:

Child		Age 4	Age 5	Age 6	Age 7	Age 8	Total
1	%	39.34	31.15	16.39	9.84	3.28	100%
	#	24	19	10	6	2	61
2	%	33.33	27.78	0.00	22.22	16.67	100%
	#	6	5	0	4	3	18
3	%	33.33	0.00	33.33	0.00	33.33	100%
	#	1	0	1	0	1	3
4	%	100.00	0.00	0.00	0.00	0.00	100%
	#	1	0	0	0	0	1

Likelihood of Enrolling	Count	Percent
Highly likely	32	50.79%
Likely	26	41.27%
Unlikely	4	6.35%
Highly unlikely	1	1.59%
Total	63	100%



B. A plan to Educate and Recruit Families from Targeted Neighborhoods about Montessori Option

From our own experiences organizing the school and the survey results, it is clear the school will need to focus recruiting on families with lower incomes and families of color to create a diverse school community. A major barrier for attending a charter school is a lack of information. Families from higher income brackets are often much more able to access information about charter options. In Salem, the Montessori preschools are all private and serve predominantly white, middle and upper income level families. In order to create a more diverse school population, Sequoia will focus its outreach predominantly on lower income and Hispanic families.

The school has already created a bilingual website and prints all marketing materials in Spanish and English. These efforts, though essential, are not enough. We know that face to face outreach is what draws families to a charter school. Parents need to understand the Montessori model and how it would enhance their child's education before signing up for something different from the "normal" choice of their neighborhood school. Parents who have not had their child in Montessori preschool need even more support to understand the opportunity Sequoia might be for their child. To fully support sustained recruitment of families from diverse backgrounds, we have developed three levels of outreach:

1. **Marketing the school:** The first level of outreach is a comprehensive, welcoming print and web campaign. The school has already developed a bilingual English and Spanish website with photographs of children with diverse ethnic and racial backgrounds. All print materials have been and will continue to be produced in both English and Spanish. Care will be taken in the creation of materials and presentations to be inclusive and accessible to all potential parent audiences. In order to reach families from low income and non-English speaking families, it will be important to reach them where they are.

The school will collaborate with agencies such as Family Building Blocks, Head Start, the Salem Keizer Coalition for Equality, AC Gilbert House, Chemeketa Early Childhood Development Center, daycares, summer camps, the YMCA, the Salem Public Library, and the Kroc Center to bring information about the school to the community. Other opportunities the school will use to reach out to parents include an informational booth at the MS Sales Saturday market, which is attended by hundreds of Hispanic families each week, neighborhood "Get to Know Montessori Nights" in neighborhoods surrounding the school and summer City of Salem Park programs. In all these outreach opportunities, bilingual Board members, staff and volunteers will be present to fully communicate with potential parents.

2. **Information sessions:** To make our commitment to diversity in recruitment ongoing and sustainable we have written into the Sequoia Teachers' and Teaching Assistants' job descriptions, in the "Essential Job Functions" section, that teachers will work with the Board to assist with recruitment and outreach activities including two workshop presentations per year to families interested in Montessori for their children. These sessions would be held at Head Start and community center locations in the targeted community. During these "Get to Know Montessori Nights" at community locations parents would be able to ask questions, see materials, try activities, and learn more about the school and Montessori. Follow up school open houses would take place after the initial information sessions. Bilingual speakers and the availability of translators will be key for these events.



- 3. Preschool parent workshops:** In partnership with Salem Keizer Coalition for Equality (SKCE), a workshop was designed to educate Spanish-speaking parents about Montessori education with the goals of providing an introduction to the Montessori method and educational tools to parents who did not have a previous understanding or access to Montessori. Curriculum was developed in Spanish and educational tools were created and given out during the workshop. The families then practiced using these techniques and materials at home with their preschool children.

These workshops would be given again to continue to educate Spanish-speaking parents who are potentially interested in the school for their children. These would be scheduled for the fall and winter ahead of the lottery in March of 2015. Having adequate information and a chance to interact with school staff will increase the likelihood that parents choose to register for the school and that their child's placement is successful. The partnership with a well established community group has helped the school craft culturally appropriate and accessible outreach (see attached letter).

- 4. Parent involvement:** Another barrier to sustained diversity can be a perception of not belonging at a school. Parents who do not feel a part of the community or valued as contributors will drift away and not encourage their friends to enroll their children. It's vital that Sequoia provides leadership opportunities to parents so they truly are a part of the school.

The Board recruitment process stated above describes one of those opportunities. In addition, for school events, fundraising, and outreach activities, care will be taken to consciously over-recruit from the parents of lower income or minority students. Attention to providing culturally appropriate and accessible options for meaningful involvement will be necessary. In addition, the school will work to remove obstacles like child care for younger children, transportation or access to technology by providing these to the highest degree possible and advertising their availability.

- 5. After school care option:** An affordable option for after school care will be provided for working parents. We understand that working parents must often rely on after school care. Therefore we will implement a sliding scale after school care program.

C. A plan to Sustain Parent and Family Education and Outreach Once the School is Operating

The above practices are designed to continue beyond the first year. We know from other successful Montessori charter schools that after the first year there is typically a waiting list and no need to actively recruit to fill seats. However, it is important to keep focusing recruitment on under-represented families in order to make sure the lottery yields a diverse class.

The culturally responsive curriculum inherent in Montessori education should help nurture this long-term focus, but we realize that putting structures in place in both Board membership and staff hiring and expectations is the only way to ensure sustained diversity.

In addition to continuing the above focused outreach activity, the ideal would be to partner to create a Montessori preschool program for low-income families. Through this process we have developed a relationship with local family advocacy groups and Head Start programs.



Combining Head Start funding and the all day kindergarten funding that may be available in coming years would allow the ideal Children’s House model of 3-6 year-olds to feed the elementary program. The locations at the Oregon School for the Deaf and the Korean Church, both with nearby Head Start programs, make this a possibility. A subcommittee of the Board will be focused on this.