

**Legacy Learning, Inc.**  
**P. O. Box 16066**  
**Oklahoma City, Oklahoma 73113**

January 26, 2024

Oklahoma State Board of Education  
Oliver Hodge Building  
2500 N. Lincoln Blvd  
Oklahoma City, OK 73105

Re: Appeal Summary Letter

Dear State Board of Education:

The Mission of P3 Urban Montessori (P3) is to provide Montessori early childhood education to children in Northeast OKC that foster autonomous, competent, responsible, adaptive citizens who are lifelong learners and problem solvers committed to uplifting their community. P3 proposes offering a unique option for children and families, using the Montessori Children's House curriculum and pedagogy, focusing on children ages 3-5.

Montessori is an age-old practice focused on hands-on-learning, created by an Italian educator and scientist, Dr. Maria Montessori, who opened her first school the Casa dei Bambini or Children's House in Rome, January 6, 1907. One-hundred seventeen years later Dr. Montessori's pedagogy is still being taught worldwide in both the private and public sectors. Despite the positive impact of the model, few publicly funded options exist, and the Montessori model remains highly inaccessible to disadvantaged children. In Oklahoma, the primary options for Montessori education are private, at almost a 10 to 1 margin in the state.

During our quest to locate facilities within the 73111 zip code, the process took our journey to the Millwood Public School district. The Millwood Board of Education at its December 4, 2023, Board meeting voted to seek legal advice and denied the application. Upon receiving notice that the Millwood Board of Education would be seeking legal advice on how to proceed; the founding P3 team reviewed the application internally and made several improvements based on new information learned in regard to funding and the location of the building.

The Millwood Board of Education, at its January 8, 2024, Board meeting ultimately voted to deny the application due to a perceived conflict of interest, as one of the co-founders is currently the superintendent of Millwood Public Schools. The denial of the application was based on "a legal determination that acting as an authorizer would present a potential conflict of interest between the district and the sitting Millwood Public Schools superintendent". No specific feedback was provided, despite §70-3-130, which requires the district to provide feedback specific to improvement. The rationale being that a legal opinion had been issued by the district's attorney to deny the application due to the perceived conflict of interest.

Since the denial, P3 sought out and was given feedback through a fellowship program and various outsourced groups. The feedback highlighted two areas (facilities and

finances) of the application that lacked details. Based on this feedback, the application has been revamped and enhanced for submission to the State Department of Education. See information below related to the two areas that lacked details

**Facilities**

A facility has been tentatively secured at the Holy Temple Baptist Church located at 1540 NE 50<sup>th</sup> on December 9, 2023. The church and members are both supportive of education and PE occupying their location. A representative of the Department of Human Services (DHS) has conducted an initial walk-through of the space and indicated it is viable for servicing three-year-old students. P3 is also in the process of collaborating with an architect and contractor to ensure the space meets all codes and requirements. The facility is 4,200 square feet and the projected duration of the contract will be starting in July 2024 through July 2029.

**Finances**

P3 has a robust plan in place to supplement standard per pupil funding. In addition to State funding provided to charter schools of: (per pupil expenditures, Redbud, Walton Grant, and the CSP grant), P3 will also pursue DHS subsidy for qualified three-year-olds at the amount of an estimated \$7,000.00 per child per year. Students utilizing before or after-school care will also utilize a DHS subsidy which could also bring in an additional (estimated) \$450,000 annually, which will be utilized to sustain the year-round programming.

Why Northeast Oklahoma City? The decision was made to anchor our efforts in the Northeast Oklahoma City community, where many marginalized communities reside. This early childhood Montessori school will be year-round and will focus on student's uninterrupted education process by eliminating long breaks in education and alleviating parents' stress about summer child care. Also, providing school choice in this area of Oklahoma City gives parents another option for a quality education experience. With the current average for academic growth being 8.4 out of 30 and academic achievement at 4.2 out of 30 on state standardized assessments, P3 feels that by preparing children early to feed into these schools, we can have a lasting impact.

In a comprehensive study of nearly 2000 adults with and without Montessori experience in childhood findings, show that attending a Montessori for at least two years was associated with significantly higher adult well-being on four factors: general well-being, engagement, social trust and social confidence.

We hope to have the opportunity to open our early childhood Montessori charter school with the Oklahoma State Department of Education as an authorizer and partner to educate and empower the Northeast community in Oklahoma City.

You may contact me, Rosalyn Robinson, via email at [legagcylearningok@gmail.com](mailto:legagcylearningok@gmail.com).

Sincerely,



Rosalyn Robinson, Startup Coordinator  
Legacy Learning, Inc.





Reverend Dr. Frank R. McClarty, Pastor

**"We Care Because Jesus Cares"**

January 23, 2024

Dear Legacy Learning:

This letter is to confirm the lease agreement between Holy Temple Baptist Church and the future tenant, P3 Urban Montessori School. The school's owner/ employees will have full access to the building located at 1540 NE 50<sup>th</sup> Street, Oklahoma, Oklahoma. The agreement is in place for 5 consecutive years, beginning July 2024 through the end of 2029, at which a renewal to extend will be extremely possible.

The Holy Temple Baptist Church congregation held its official voting on December 9, 2023, in unanimous approval of leasing the building for the purpose of a charter school, specifically named P3 Urban Montessori.

We look forward to having such an educational opportunity extended to families in the metro area. Therefore, we welcome the invitation to lease our facility under such great circumstances and need.

Respectfully submitted,

  
Dr. Frank R. McClarty, Pastor









**MILLWOOD PUBLIC  
SCHOOLS**

January 24, 2024

Legacy Learning, Inc.  
P. O. Box 16066  
Oklahoma City, Oklahoma 73113

Dear Legacy Learning, Inc:

The Millwood Board of Education has denied the request to serve as authorizer for the P3 Urban Montessori. The denial is based on a legal determination that acting as authorizer would present a potential conflict of interest between the district and the sitting Millwood Public Schools superintendent.

Please find attached the board minutes of December 4, 2023 and January 8, 2024.

Regards,

Rickey T.L. Hunt, Sr., President  
Millwood Board of Education

Enclosure (2)





**MILLWOOD PUBLIC  
SCHOOLS**

**Millwood Board of Education Regular Meeting Minutes  
Monday, January 8, 2024 • 5:00 PM  
Millwood High School Commons  
6724 Martin Luther King Avenue, Oklahoma City, OK 73111**

**PENDING BOARD APPROVAL**

**1. CALL TO ORDER**

Meeting called to order at 500PM by Board President Rickey T.L. Hunt, Sr.

**2. PLEDGE OF ALLEGIANCE**

The pledge of allegiance was said in unison.

**3. ROLL CALL**

Attendance Taken at 5:00 PM.

Ms. LaToya High:	Present
Mr. Rickey T.L. Hunt, Sr.:	Present
Mr. Marvin Provo:	Present
Mr. Milo Wilson:	Present
Ms. L. Regina Richardson:	Absent

**4. APPROVAL OF PREVIOUS MINUTES**

December 4 and December 11, 2023, Special Meeting Minutes  
Motion to approve December 4 and December 11, 2023, Special Meeting Minutes. This motion, made by Mr. Milo Wilson and seconded by Ms. LaToya High, passed.

Ms. L. Regina Richardson:	Absent
Ms. LaToya High:	Yea
Mr. Rickey T.L. Hunt, Sr.:	Yea
Mr. Marvin Provo:	Yea
Mr. Milo Wilson:	Yea

**5. RECOGNITION OF SPECIAL GUEST(S) AND SPECIAL ANNOUNCEMENTS**

School Board Recognition - Superintendent Dr. Robinson-Woods  
January is School Board Recognition Month and the Millwood Board members were recognized for their service to the district. Students of the Millwood marching band, along

with their band director and assistant band director, thank the board for approving travel to the Bahamas in November 2023.

6. **SUPERINTENDENT'S REPORT**

The report was given as stated.

A. **Principal Reports**

Millwood Elementary Learning Academy - Principal Hamilton-Greene  
Millwood Arts Academy Middle School - Principal Pete  
Millwood High School - Principal Evans

**Attendance Update Taken at 5:18 PM.**

Ms. L. Regina Richardson: Present

Ms. Richardson arrived at 5:18

B. **Benchmark Reports - Elaine Buxton**

Millwood Arts Academy Middle School  
Millwood High School

C. **Operations Report - Shannon Hayes, Director of Operations**

Athletics Revenue and Expense

D. **Superintendent Robinson-Woods, Ed.D.**

SPED Designation update - Yolanda Cato, District Sped Coordinator  
Bond Update  
Marquee Update

7. The Board will consider holding a discussion and taking possible action concerning the P3 Urban Montessori Charter. Legacy Learning Inc., DBA P3 Urban Montessori Charter School is proposing a small charter (90 students) ages 3-5 in the 73111 zip code. Motion to deny action concerning the application for the P3 Montessori Charter, based on recommendation from attorney at The Center for Education Law. This motion, made by Mr. Milo Wilson and seconded by Ms. LaToya High, passed.

Ms. LaToya High: Yea

Mr. Rickey T.L. Hunt, Sr.: Yea

Mr. Marvin Provo: Yea

Ms. L. Regina Richardson: Yea

Mr. Milo Wilson: Yea

8. **ENROLLMENT**

Current enrollment is 1065.

A. **Transfers**

Nine (9) denials for enrollment application since last board meeting. All denial reasons are based on capacity numbers.

B. **Appeals**

No appeals, and two denials are within the time frame to appeal.

9. **BOARD POLICIES**

None

10. **TREASURER'S REPORT - David Harp Treasurer**

December 31, 2023

The report was given by Superintendent Dr. Robinson-Woods.

11. **CONSENT AGENDA**

The Millwood Board of Education uses a consent agenda during school board meetings. Items of a routine nature normally approved at board meetings, will be approved by one vote unless any board member desires to have a separate vote on any or all items. The consent agenda consists of the consideration, review, discussion and possible motion to approve the following items as listed under the appropriate categories and identified individually by number and/or alphabet. Items 11A, 11B, 11B1, and 12A - 12K. Motion to approve consent agenda items 11A, 11B, 11B1, and 12A - 12K. This motion, made by Ms. LaToya High and seconded by Ms. L. Regina Richardson, passed.

Ms. LaToya High: Yea

Mr. Rickey T.L. Hunt, Sr.: Yea

Mr. Marvin Provo: Yea

Ms. L. Regina Richardson: Yea

Mr. Milo Wilson: Yea

A. **EMPLOYMENTS**

Recommend the following person(s) be employed as of the effective date specified; and that contract(s) or assignment notifications with the appropriate persons herein listed be approved and executed in the name of the District, the Superintendent or person designated by her; with all other personnel recommendations, including terminations, leaves, retirements and resignations. **See Attachment "A"**

B. **APPROVAL OF ENCUMBRANCES**

Fund	Purchase Order Numbers	Amount
11 - General (Operations)	188 - 206	\$79,540.80
22 - Child Nutrition	6	\$6,000.00

1. **APPROVAL OF ENCUMBRANCES - CHANGE ORDER REPORT**

Fund	Purchase Order Numbers	Amount
11 - General (Operations)	26, 31, 115, 136, 160 and 174	\$8,888.29

12. **PROPOSED GENERAL BUSINESS**

- A. Discussion and vote to approve Darwin Franklin, Head Football Coach, to attend the American Football Coaches Association Conference in Nashville, TN from January 7 - 10, 2024, at no expense to the district.

- B. Discussion and vote to approve Superintendent Dr. Robinson-Woods' travel and expenses to attend the ASU GSV Summit, April 14 - 17, 2024, in San Diego, California.
- C. Discussion and vote to approve expenses for Phredd Evans, HS Principal, to travel with the Multicultural Club to Europe from May 31 - June 10, 2024.
- D. Discussion and possible motion to approve Phredd Evans, HS Principal, Brittney Morgan, College and Career Coordinator and up to 10 high school seniors to travel to McKinney, Texas on Saturday, February 17, 2024, to attend College Megafest.
- E. Activity Fund Summary of Accounts November and December FY24
- F. Action to approve retroactive cash advancement to be used for meals, from the boys' basketball account 805.1 to Dorrian Williams in the amount of \$1,610.00 for the basketball tournament in St Louis, MO on December 15 - 17, 2023.
- G. Action to approve retroactive hotel expenses for Leslie Breaux (boys basketball team bus driver) at the Springhill Suites in St. Louis, MO with proceeds to come out of account 805.1 in the amount of \$188.32.
- H. Action to approve retroactive cash advancement to be used for meals, from the girls' basketball account 806.1 and 806.3 to Dava Albert in the amount of \$1500.00 for the basketball tournament in Bartlesville, OK on January 3 - 6, 2024.
- I. Action to approve a valentine candy grams fundraiser for Millwood Arts Academy Middle School cheer from February 1-14, 2024 and proceeds to be placed in 808.2 activity account.
- J. Action to approve the collection of Daddy/Daughter Dance Admission for MELA from January 9 to February 8, 2024, and proceeds to be placed in 961.1 activity account.
- K. Action to approve Daddy/Daughter Dance Concession for MELA on February 8, 2024, and proceeds to be placed in 961.1 activity account.

13. **\*NEW BUSINESS**

"New Business" is any matter not known about or which could not have been reasonably foreseen prior to the time of posting the agenda.

Motion to approve the following four activity fund fundraiser: 1. Valentine candy grams fundraiser for Millwood High School Senior Class from February 1 to February 13 2024 and proceeds to be placed in 912.1 activity account. 2. Collection of money for talent show admission for Millwood High School Senior Class on February 1, 2024 and proceeds to be placed in 912.1 activity account. 3. Collection of money for Valentine Dance admission on February 14, 2024 for Millwood Arts Academy with proceeds to be placed in 912.1 activity account 4. Collection of money for Valentine Dance admission on February 15, 2024 for Millwood High School with proceeds to be placed in 912.1 activity account. This motion, made by Ms. LaToya High and seconded by Ms. L. Regina Richardson, passed.

Ms. LaToya High: Yea

Mr. Rickey T.L. Hunt, Sr.: Yea

Mr. Marvin Provo: Yea

Ms. L. Regina Richardson: Yea

Mr. Milo Wilson: Yea

**14. STATEMENT OF PUBLIC CONCERN**

No Statement of Public Concern.

**15. EXECUTIVE SESSION**

A. Proposed executive session for the purpose of conducting the superintendent's mid-year evaluation. 25 O.S. § 307 (B)(1)

B. Vote to convene or not to convene into executive session.

Motion to convene into executive session at 6:09PM. This motion, made by Ms. LaToya High and seconded by Mr. Milo Wilson, passed.

Ms. LaToya High: Yea

Mr. Rickey T.L. Hunt, Sr.: Yea

Mr. Marvin Provo: Yea

Ms. L. Regina Richardson: Yea

Mr. Milo Wilson: Yea

C. Acknowledge Board's return to Open Session.

The board returned from the executive session at 7:13PM.

D. Executive Session minutes compliance announcement.

The board entered into executive session at 6:09PM for the purpose of conducting the superintendent's mid-year evaluation. 25 O.S. § 307 (B). Those present in the executive session were Rickey T.L. Hunt, Sr., Boardmember, Milo Wilson, Boardmember, LaToya High, Boardmember, Marvin Provo Boardmember, L Regina Richardson, Boardmember and Superintendent Robinson-Woods.

No action was taken by the board of education.

**16. VOTE TO ADJOURN**

Motion to adjourn at 7:13PM. This motion, made by Ms. LaToya High and seconded by Mr. Marvin Provo, passed.

Ms. LaToya High: Yea

Mr. Rickey T.L. Hunt, Sr.: Yea

Mr. Marvin Provo: Yea

Ms. L. Regina Richardson: Yea

Mr. Milo Wilson: Yea

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Board President, Rickey T. L. Hunt, Sr.

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Board Vice President, Milo Wilson

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Board Clerk, LaToya High

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Board Member, Marvin Provo

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Board Member, L. Regina Richardson





**MILLWOOD PUBLIC  
SCHOOLS**

**Millwood Board of Education Special Meeting Minutes  
Monday, December 4, 2023 • 5:00 PM  
Millwood High School Commons, Millwood Public Schools  
6724 Martin Luther King Avenue, Oklahoma City, OK 73111**

1. **CALL TO ORDER**

Meeting called to order at 5:01PM by Board President Rickey T.L. Hunt, Sr.

2. **PLEDGE OF ALLEGIANCE**

The pledge of allegiance was said in unison.

3. **ROLL CALL**

Attendance Taken at 5:01 PM.

Ms. LaToya High:	Present
Mr. Rickey T.L. Hunt, Sr.:	Present
Mr. Marvin Provo:	Present
Ms. L. Regina Richardson:	Present
Mr. Milo Wilson:	Present

4. **APPROVAL OF PREVIOUS MINUTES**

November 6, 2023 Special Meeting Minutes

Motion to approve minutes of the November 6, 2023 Special Meeting. This motion, made by Mr. Milo Wilson and seconded by Ms. LaToya High, passed.

Ms. LaToya High:	Yea
Mr. Rickey T.L. Hunt, Sr.:	Yea
Mr. Marvin Provo:	Yea
Ms. L. Regina Richardson:	Yea
Mr. Milo Wilson:	Yea

5. **RECOGNITION OF SPECIAL GUEST(S) AND SPECIAL ANNOUNCEMENTS**

No recognitions or special Announcements.

6. **SUPERINTENDENT'S REPORT**

The report was given as stated.

A. **Principals Report**

Millwood Elementary Learning Academy - Principal Hamilton-Greene  
Millwood Arts Academy Middle School - Principal Pete  
Millwood High School - Principal Evans

B. **Annual Student Dropout Report**

Report will be given in January 2024.

C. Director of Operations, Shannon Hayes

D. **Superintendent Robinson-Woods, Ed.D.**

SPED Designation update-Cato

Bond update

State Report Card update

High School Principal search

Teacher Bill of Rights

Marquee Update

Presentation of Charter School Policy for Approval

EHBJ-R - Charter School (Regulations)

The SPED report will be given at the next board meeting.

E. Discussion and possible motion to approve EHBJ-R - Charter School (Regulations).

Motion to approve EHBJ-R - Charter School (Regulations). This motion, made by Ms. LaToya High and seconded by Mr. Marvin Provo, passed.

Ms. LaToya High: Yea

Mr. Rickey T.L. Hunt, Sr.: Yea

Mr. Marvin Provo: Yea

Ms. L. Regina Richardson: Yea

Mr. Milo Wilson: Yea

F. The Board will consider holding a discussion and taking possible action concerning the P3 Urban Montessori Charter. Legacy Learning Inc., DBA P3 Urban Montessori Charter School is proposing a small charter (90 students) ages 3-5 in the 73111 zip code.

Motion to deny request until board seeks legal advice. This motion, made by Ms. LaToya High and seconded by Mr. Milo Wilson, passed.

Ms. LaToya High: Yea

Mr. Rickey T.L. Hunt, Sr.: Yea

Mr. Marvin Provo: Yea

Ms. L. Regina Richardson: Yea

Mr. Milo Wilson: Yea

with their band director and assistant band director, thank the board for approving travel to the Bahamas in November 2023.

6. **SUPERINTENDENT'S REPORT**

The report was given as stated.

A. **Principal Reports**

Millwood Elementary Learning Academy - Principal Hamilton-Greene

Millwood Arts Academy Middle School - Principal Pete

Millwood High School - Principal Evans

Attendance Update Taken at 5:18 PM.

Ms. L. Regina Richardson: Present

Ms. Richardson arrived at 5:18

B. **Benchmark Reports - Elaine Buxton**

Millwood Arts Academy Middle School

Millwood High School

C. **Operations Report - Shannon Hayes, Director of Operations**

Athletics Revenue and Expense

D. **Superintendent Robinson-Woods, Ed.D.**

SPED Designation update - Yolanda Cato, District Sped Coordinator

Bond Update

Marquee Update

7. The Board will consider holding a discussion and taking possible action concerning the P3 Urban Montessori Charter. Legacy Learning Inc., DBA P3 Urban Montessori Charter School is proposing a small charter (90 students) ages 3-5 in the 73111 zip code. Motion to deny action concerning the application for the P3 Montessori Charter, based on recommendation from attorney at The Center for Education Law. This motion, made by Mr. Milo Wilson and seconded by Ms. LaToya High, passed.

Ms. LaToya High: Yea

Mr. Rickey T.L. Hunt, Sr.: Yea

Mr. Marvin Provo: Yea

Ms. L. Regina Richardson: Yea

Mr. Milo Wilson: Yea

8. **ENROLLMENT**

Current enrollment is 1065.

A. **Transfers**

Nine (9) denials for enrollment application since last board meeting. All denial reasons are based on capacity numbers.

B. **Appeals**

No appeals, and two denials are within the time frame to appeal.

**7. ENROLLMENT**

Current district enrollment is 1089.

A. Transfers

B. Appeals

**8. BOARD POLICIES**

BAAB - Nepotism

CKAF - Use of Metal Detectors

EHBF - Homebound Instruction

FFFD - Vehicle Use and Parking Students

FNF - Search of Students

FNF-R - Search of Students (Regulation)

FNF-E1 - Student Searches Checklist

FNF-E2 - Student Searches (Authority to Transport)

FMFE - Spectator Code of Conduct - Athletics Program

FO - Student Discipline

FO-R1 - Control and Discipline

Motion to approve board policies. This motion, made by Ms. LaToya High and seconded by Mr. Milo Wilson, passed.

Ms. LaToya High: Yea

Mr. Rickey T.L. Hunt, Sr.: Yea

Mr. Marvin Provo: Yea

Ms. L. Regina Richardson: Yea

Mr. Milo Wilson: Yea

**9. TREASURER'S REPORT - David Harp, Treasurer**

Treasurer Report 11302023

**10. CONSENT AGENDA**

The Millwood Board of Education uses a consent agenda during school board meetings. Items of a routine nature normally approved at board meetings, will be approved by one vote unless any board member desires to have a separate vote on any or all items. The consent agenda consists of the consideration, review, discussion and possible motion to approve the following items as listed under the appropriate categories and identified individually by number and/or alphabet, Items 10A, 10B and 11A - 11H.

Motion to approve consent agenda Items 10A, 10B and 11A - 11H. This motion, made by Ms. L. Regina Richardson and seconded by Ms. LaToya High, passed.

Ms. LaToya High: Yea

Mr. Rickey T.L. Hunt, Sr.: Yea

Mr. Marvin Provo: Yea

Ms. L. Regina Richardson: Yea

Mr. Milo Wilson: Yea

**A. EMPLOYMENTS**

Recommend the following person(s) be employed as of the effective date specified; and that contract(s) or assignment notifications with the appropriate persons herein listed be approved and executed in the name of the District, the Superintendent or person designated by her; with all other personnel recommendations, including terminations, leaves, retirements and resignations. **See Attachment A and B.**

**B. APPROVAL OF ENCUMBRANCES**

<b>Fund</b>	<b>Purchase Order Numbers</b>	<b>Amount</b>
11 - General (Operations)	181 - 187	\$20,641.16
21 - Building	15	\$22,294.40

**11. PROPOSED GENERAL BUSINESS**

- A. Discussion and motion to approve the Millwood Public Schools Gifted and Talented Education Plan for SY 2023-2024.
- B. Discussion and possible vote approve retroactive cash advancement to be used for meals, from the boys basketball account 805.1 to Dorrian Williams in the amount of \$1995.00 and girl basketball account 806.01 to Dava Albert in the amount of \$1,365.00 for the basketball tournament in Hays, Kansas on November 29 - December 2, 2023.
- C. Action to approve Activity Fund Summary of Accounts September FY2024.
- D. Action to approve Activity Fund Summary of Accounts October FY2024.
- E. Action to approve collection of MELA cheer clinic fees for MELA Cheer and proceeds to be placed in the 808.3 activity account.
- F. Action to approve collection of fourth grade promotion fees for MELA with proceeds to be placed in the 961.1 activity account.
- G. Action to approve collection of sales for yearbooks for MELA and proceeds to be placed in the 961.01 activity account.
- H. Discussion and possible motion to increase the HS Internship Courses I and II to three (3) hours to meet the state requirement.

**12. STATEMENT OF PUBLIC CONCERN**

There was no statement of public concern.

**13. VOTE TO ADJOURN**

Motion to adjourn at 6:26PM. This motion, made by Mr. Milo Wilson and seconded by Ms. L. Regina Richardson, passed.

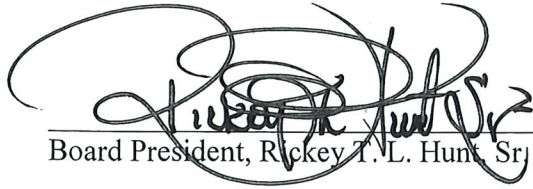
Ms. LaToya High: Yea

Mr. Rickey T.L. Hunt, Sr.: Yea

Mr. Marvin Provo: Yea

Ms. L. Regina Richardson: Yea

Mr. Milo Wilson: Yea



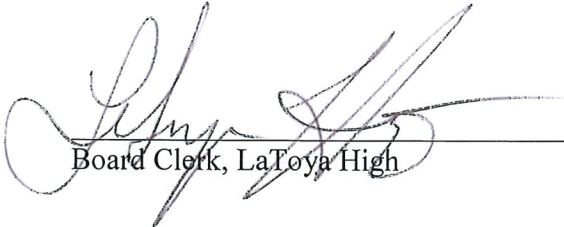
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Board President, Rickey T. L. Hunt, Sr.



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Board Vice President, Milo Wilson



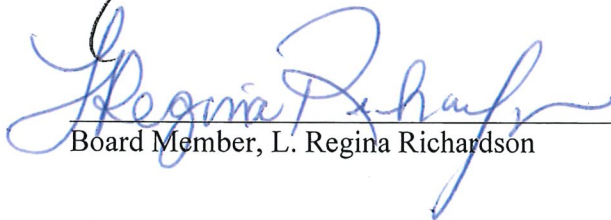
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Board Clerk, LaToya High



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Board Member, Marvin-Provo



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Board Member, L. Regina Richardson



# **P3 Urban Montessori Play, Process, Progress**

**Charter Application**

**Resubmission January 3, 2024**

**PRESENTED ON BEHALF OF  
Legacy Learning Board of Directors**

**Presented to:  
Millwood Public Schools  
% Superintendent Cecilia Robinson-Woods  
& Millwood Public Schools  
Board of Education**



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## I. CHARTER SCHOOL OVERVIEW

**Mission, Vision, and Educational Philosophy.** Please provide the Mission Statement for the school, the date of its adoption, and the organizational entity or person(s) formulating such statement. The mission is a statement of the fundamental purpose of the school, describing why it exists. The vision statement outlines how the school will operate and what it will achieve long term. Taken together, these statements should:

- Identify the students and community to be served
- Illustrate what success will look like

P3 Urban Montessori-Play, Process, Progress (P3) will be a newly formed school, dedicated to uplifting the Northeast Oklahoma City (OKC) community by providing free and public Montessori-based early education programs to marginalized families. The founding board was formed by a group of passionate educators, parents, and community members that have all had experience with public and/or private Montessori and believe in the power of the approach.

P3 seeks to serve families with children ages three to five in the Northeast OKC area and who primarily reside in the 73111 zip code. Families that reside in this community are 83.2%<sup>1</sup> Black. The average household income in this area is under \$25,000 annually. Children under the age of five are the largest population category at 1,002 of the 11,781 residents.

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<sup>1</sup>United States Zip Codes (n.d.). United States Zip Codes. Retrieved April 11, 2023 from <https://www.unitedstateszipcodes.org>

## **Mission Statement**

P3 seeks to provide a culturally responsive Montessori early childhood education to children in Northeast OKC that fosters autonomous, competent, responsible, adaptive citizens who are lifelong learners and problem solvers committed to uplifting their community.

## **Vision**

Respecting individual children's development and potential is at the core of P3, guided by the philosophy of Dr. Maria Montessori. The P3 founding board is a diverse community of educators, parents, and supporters committed to educational excellence in the Montessori practice, serving students ages 3-Kindergarten. By combining highly trained staff and committed families within the Northeast OKC community, P3 seeks to design classroom environments that encourage students' natural curiosity and development. Embracing the philosophy of "following the child," we seek to inspire a love of independent learning and foster critical thinking. Through engaging students in a challenging and meaningful Montessori curriculum, we will establish a firm foundation in self-directed learning that will shape their lens toward education for their entire school career, instilling leadership, independence, and respect for self and others will nurture children to become thoughtful and confident citizens.

## **Attainable and measurable goals**

- P3 will provide forty low-income students and their families with excellent year-round Montessori education.

- Secure training for Montessori Staff for fall 2024 including the following training before school begins: Montessori Philosophy, Material making, Practical Life, Sensorial, Math Part 1, Responsive Classroom, Language Part 1, and Cultural.
- Develop a strategic plan for Operations for Years 1, 2, and 3 by fall 2024.
- Secure philanthropic and foundation funding with a goal amount of \$250,000.00 in addition to start-up grants by fall 2024.

As a note, P3 will also apply with Millwood Public Schools given that our indicated catchment area falls within the Millwood District alongside Millwood Elementary Learning Academy, Thelma Parks, and MLK are all in the 73111 area.

### ***Educational Philosophy***

P3 will be entrenched in the philosophies of Dr. Maria Montessori and the Montessori method. Maria Montessori, born in 1870 in Chiaravalle, Italy to an educated and well-off family, became a famed Italian physician, author, and educator who applied rigorous scientific principles to the study of the schooling of young children. The result was a revolutionary approach that emphasized the importance of self-directed activity for children and that the learning environment must be adapted to the developmental level of the particular child. Montessori placed great importance on the role that physical activities have in helping children master both practical skills and abstract

ideas<sup>2</sup>. Under the Montessori model students will engage in work cycles, performing that cycle as long as it remains interesting, then cleaning up the activity and returning it to the shelf rather than making another work choice.

**2. Educational Need and Student Population.** Provide a description of the anticipated student population to be served. This description should include geographic preferences (if applicable), student's anticipated educational needs, and any non-academic challenges the school is likely to encounter. Identify any enrollment priorities and methods to be employed for enrollment eligibility and selection, including those that guarantee no enrollment restrictions based on ethnicity, national origin, gender, income level, disabling condition, proficiency in the English language, or measures of achievement or aptitude.

P3 aims to serve students aged 3 to 5 years old in Northeast OKC, primarily focusing on the 73111 zip code. In this area, three schools cater to children in this age range. The first is Millwood Elementary, currently at capacity in every grade from PK-12th, except for PreK, which has a limited number of available seats. Consequently, Millwood Public School district is not accepting additional students. Millwood is a small district within OKC boundaries serving Northeast OKC students but is not an OKC Public school district.

The two elementary schools serving the targeted area are Martin Luther King Jr. Elementary and Thelma Parks Elementary. There is a significant need for students in our targeted area to have access to a school that focuses on developing learning skills that will stay with them throughout their formal education. The planned location for the P3 school will be within a 2-mile radius of both Martin Luther King Elementary and Thelma Parks

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<sup>2</sup> Montessori, M. (1912). *The Montessori Method: Scientific Pedagogy as Applied to Child Education in "The Children's Houses"* with Additions and Revisions by the Author. Frederick A. Stokes Company.

Elementary, making travel convenient for parents. Efforts to ensure open enrollment as a school of choice will be promoted through local radio stations and mail flyers sent to all homes in the target school area.

Below is the 2022-2023 report card of the two schools in P3's target area. The data indicates that the two schools are under-performing, and families could greatly benefit from having a choice school placed near their homes.

**MELA Millwood Elementary Learning Academy**

<b><u>Indicator</u></b>	<b><u>Description</u></b>	<b><u>School Report Card grade</u></b>
<u>Academic Achievement</u>	<u>How prepared are students for the next grade, course, or level?</u>	<u>(D)</u> <u>6.4 out of 35</u>
<u>Academic growth</u>	<u>How are students growing compared to their performance the previous year?</u>	<u>(D)</u> <u>9.23 out of 30</u>
<u>English Language Proficiency Progress</u>	<u>How well are English learners meeting their language-acquisition targets?</u>	<u>N/A</u>
<u>Chronic Absenteeism</u>	<u>What percentage of students is in good attendance?</u>	<u>(C)</u> <u>1.85 out of 10</u>
<u>Overall</u>	<u>How did the school perform overall?</u>	<u>(F)</u>

**Martin Luther King Elementary School**

<b><u>Indicator</u></b>	<b><u>Description</u></b>	<b><u>School Report Card grade</u></b>
<u>Academic Achievement</u>	<u>How prepared are students for the next grade, course, or level?</u>	<u>(D)</u> <u>6.3 out of 30</u>
<u>Academic growth</u>	<u>How are students growing compared to their performance the previous year?</u>	<u>(C)</u> <u>12.38 out of 30</u>
<u>English Language Proficiency Progress</u>	<u>How well are English learners meeting their language-acquisition targets?</u>	<u>(D)</u> <u>3.57 out of 10</u>
<u>Chronic Absenteeism</u>	<u>What percentage of students is in good attendance?</u>	<u>(F)</u> <u>0 out of 10</u>
<u>Overall</u>	<u>How did the school perform overall?</u>	<u>(D)</u>

## Thelma Parks Elementary

Indicator	Description	School Report Card grade
Academic Achievement	How prepared are students for the next grade, course, or level?	<u>(F)</u> <u>0 out of 30</u>
Academic growth	How are students growing compared to their performance the previous year?	<u>(F)</u> <u>3.7 out of 30</u>
English Language Proficiency Progress	How well are English learners meeting their language-acquisition targets?	<u>(D)</u> <u>1.67 out of 10</u>
Chronic Absenteeism	What percentage of students is in good attendance?	<u>(F)</u> <u>0 out of 10</u>
Overall	How did the school perform overall?	<u>(F)</u>

As will be detailed later in the application, P3 also aims to serve students on a year-round calendar providing an option for safe and academically focused childcare for local families of children ages 3-6. Recent data from the Department of Labor indicates that childcare costs can represent between 8% and 19.3%<sup>3</sup> of median family income per child, resulting in an even larger percentage for families who fall below the median. P3's free, Montessori-based approach has the potential to provide a great deal of financial relief to low-income families. Current data shows that in the 73111 zip code there are a total of 1,569 children between the ages of 0-9 with 887 being male and 682 being female.<sup>4</sup>

**3. Education Plan/School Design.** Provide an overview of the education program of the proposed school, including major instructional methods and non-negotiables of the school model. Please provide a minimum of five (5) and a maximum of seven (7) instructional goals for the proposed school to have been attained/achieved by the end of the first five (5) years of operation.

<sup>3</sup> <https://blog.dol.gov/2023/01/24/new-childcare-data-shows-prices-are-untenable-for-families>

<sup>4</sup> 2020 Census Demographic Profile

## **Instructional Model**

P3 seeks to develop an educational program around the following instructional principles:

- Supporting a child's development and potential through intentional, discovery-based play is the basis for a Montessori education.  
  
Preparing students to guide their own learning through the development of executive functioning and social-emotional skills while nurturing their natural curiosity is the goal.
- Building an autonomous learning culture so that children are prepared to guide their education throughout their school career is our measure of success.
- Our Montessori program will offer an extended calendar that seeks to serve our community year-round. Providing instruction in trimesters will allow for student and family breaks and teacher training. Partnering with the Center for Guided Montessori will be vital to developing teachers and support staff to achieve our optimum outcomes.
- Mixed-age classrooms allow students to more aptly learn from their peers than from adults. This also encourages children to build strong bonds with others not of their own age (much like older and younger siblings).
- P3 understands that age 3 is a turning point for many children and wants to capture the shift from unconsciously absorbing their environment to consciously absorbing information from their environment.



## **Instructional Goals**

The five instructional goals that will be achieved consist of:

1. **Expand Children's Cultural Awareness:**

- Specific materials and resources will be incorporated into the geography lessons.
- Guides will monitor students' understanding of different cultures.

2. **Helping Students Work as a Team:**

- Creation of team-building activities engaging all students, especially crucial in mixed-age classes.
- Evaluation of the utilization of activities ensuring active involvement of all students.

3. **Nurture a Positive Classroom Environment:**

- Clear outlining of desired outcomes and behaviors.
- Implementation of positive reinforcement strategies to attain the desired environment.

4. **Enhance Creativity in Students:**

- Dedicated time for developing project-based initiatives.
- Monthly evaluation of the number of creative projects completed by students.

5. **Foster Active Listening in Students:**

- Alignment with the Montessori method of grace and courtesy.
- Ensuring students take turns when speaking, validate peers' points of view, and ask open-ended questions.

### **Measurable Goals**

Early childhood assessments play a crucial role in children's development. P3 plans to use the Early Learning Quick assessment, an online tool to gauge children's progress compared to national standards. The goal is for 80% of students to meet identified learning targets for Montessori goals and the Early Learning Quick Assessment.

### **Measurement of Student Success:**

Student outcomes and parent satisfaction will be the primary indicators of success for the school. Children transitioning to first grade will undergo a kindergarten readiness assessment, with the expectation that 80% of them will exit reading at the first-grade level.

### **Programming and Funding for 3-Year-Olds:**

P3 will be licensed to serve 3-year-olds eligible for a DHS child care subsidy. While oversight for the 3-year-olds program will be managed by other state entities with additional licensing requirements, these students will be fully integrated into mixed-age programming alongside other students.

**4. Community Engagement.** Describe the relationships, if any, that you have already established to generate community engagement in and support for the proposed schools. If you have assessed demand and/or solicited support for the school, briefly describe these activities and summarize their results.

P3 Urban Montessori is affiliated with Legacy Learning, a collective of individuals spanning education, business, philanthropy, and early childhood

sectors, primarily based in OKC. The board boasts expertise in 501(3)c and Montessori-specific experiences, with members having established connections to education statewide, philanthropic organizations in OKC, and ties to the targeted community. While P3 will have its own tax identification number, Legacy Learning will function as a foundation dedicated to advancing the educational and cultural well-being of students within the Northeast OKC designated school boundaries.

Legacy Learning has engaged with parents expressing interest in public Montessori through an informal network. Planned meetings with local philanthropic organizations supporting marginalized communities and early childhood development signify the next steps in the process.

Qualitative data on interest levels was initially collected through phone calls or in-person meetings with seven parents actively seeking high-quality early childhood care in Northeast OKC. Over the past six months, conversations have taken place with individuals' families in both one-on-one and small group settings. Some of these families, with children or grandchildren aged two, currently have children enrolled in Sunbeam. The community support section includes a signed petition from families in Northeast OKC. These families either paid for public Montessori or opted for private smaller settings due to the lack of availability. Signed letters of support have also been received from businesses and community leaders endorsing the establishment of a new early childhood Montessori, and those letters are attached to this application.

The challenge lies in introducing a newly formed Montessori school to northeast OKC, where there may be limited knowledge or exposure to the Montessori method, given the age of admissions (three years old) and the

potential struggle of retaining families with a new education method.

Recognizing this challenge underscores the importance of community support and engagement.

**5. Leadership and Governance.** Explain the governance philosophy that will guide the board, including the nature and extent of involvement by key stakeholder groups.

P3 has undergone an extensive process to establish a founding board and leadership team. As of the fall of 2023, Legacy Learning has hired a full-time Start-up Team Coordinator, slated to transition into P3's Business Manager, tentatively identified a School Leader, and recruited eleven volunteer members to serve on the Founding Board.

The P3 Board recognizes its role as providing strategic direction, oversight, and policy guidance to the organization. Their responsibilities include setting the mission, vision, and long-term goals, ensuring the organization operates in compliance with legal, ethical, and fiduciary standards. Importantly, the board understands its role as overseers rather than direct managers of the charter school.

Leadership qualifications are collectively understood by the Board and School to be essential for effective organizational functioning, with each playing a distinct role in leadership and decision-making processes. The following criteria were considered when selecting members for the founding board:

**a. Educational Experience:** Members with backgrounds in teaching, administration, educational policy, and Montessori knowledge.

- b. **Financial Expertise:** Individuals with experience in finance, accounting, or budgeting to manage the school's financial resources. Familiarity with fundraising and grant-writing for securing additional funding.
- c. **Legal Knowledge:** Board members with legal expertise to navigate education laws, contracts, and compliance issues.
- d. **Leadership Skills:** Demonstrated leadership skills in educational and/or professional settings.
- e. **Strategic Planning Skills:** Ability to engage in strategic planning and long-term visioning for the school's growth and development. Capable of setting goals and monitoring progress.
- f. **Community Engagement:** Ties to the local community and a commitment to engaging with parents, students, and other stakeholders.
- g. **Commitment to the Mission:** Alignment with the school's mission, vision, and educational philosophy.

In compliance with the Act, ten of P3's proposed board members reside within the state of Oklahoma. The current board comprises eleven individuals, a structure informed by the understanding that effective charter school boards typically consist of between eleven and fifteen trustees, as highlighted in the book "Board Structure: A Guide to Bylaws, Officers, Committees, Responsibilities, and More for Exceptional Charter Schools." The diverse skills and expertise among the eleven members collectively contribute to a well-rounded board, ensuring a successful launch in the fall of 2025.

## **II. CHARTER SCHOOL NARRATIVES**

### **SECTION 1. EDUCATIONAL DESIGN & CAPACITY**

This section includes primary instructional methods and assessment strategies, non-negotiable elements of the school model, and evidence that promises success for the program with the anticipated student population.

#### **A. Consistency with the Purpose(s) of the Act**

1. Describe how the school will fulfill one or more of the purposes of a charter school as enumerated in the Oklahoma Charter School Act.
2. Provide certification that the proposed school has not had or will not have an affiliation with a non-public sectarian agency, organization or association.

#### ***Purposes of the Oklahoma Charter School Act***

P3 will fulfill one or more of the purposes of a charter school as enumerated in the Oklahoma Charter School Act. The Intent and Purpose of the Act states, “Charter schools are public schools given the freedom of more innovation while still being held accountable for advancing student achievement and financial accountability. Because they are public, they are open to all students and do not charge tuition nor have special entrance requirements.”

P3 aims to fulfill various objectives outlined in the Charter Schools Act, with a primary focus on:

##### **1. Improving Student Learning:**

- The Montessori method emphasizes holistic development, encompassing intellectual, social, physical, and emotional aspects.

- Practical life activities, a key element of the Montessori curriculum, mirror everyday experiences, instilling practical skills and fostering social development.
- The concept of "grace and courtesy" is integrated, teaching manners, respect, and social skills. Adult supervision ensures compliance with health inspections under Public Law 108-265 in activities such as students cleaning up after themselves when eating.

## **2. Increasing Learning Opportunities:**

- Mixed-aged classes provide a unique learning environment where younger students benefit from interactions with older peers.
- Opportunities for leadership emerge as older students share knowledge and experiences, promoting teamwork, turn-taking, and effective communication.
- Year-round education minimizes summer learning loss, enhances knowledge retention, and provides consistent care for working parents.

## **3. Encouraging Innovative Teaching Methods:**

- Montessori's non-traditional approach fosters independence and personal development, with teachers serving as guides.
- The mixed-aged classroom with peer teaching reflects an innovative model where students support each other's learning.

## **4. Providing Additional Academic Choices:**

- The Montessori model offers a modified educational method suitable for all children, fostering independence, self-discipline, and self-correction.
- Parents appreciate the strong sense of community within the classroom and the emphasis on independence.
- Hands-on learning, practical life activities, and flexible learning styles provide a unique curriculum experience.

We believe that the Montessori method offers an exceptional method for learning that is not offered in OKCPS and that could be an incredible benefit to the students we seek to serve. An article from the National Child Development Council titled "The Science Behind Montessori Education: Evidence-Based Success in the Classroom" highlights neuroscience research underscoring the importance of early brain development. The Montessori method is able to achieve this by utilizing hands-on activities, engaging the senses, and building a robust foundation for academic and personal success during this critical period. Additionally, the child-centered approach in Montessori caters to individual needs, interests, and abilities, as supported by neuroscience research.

Overall, P3 endeavors to align with the Charter Schools Act's goals, integrating innovative methods to enhance student learning and development.

### **Conformity to Non-Sectarian Requirement**

P3 is committed to the principles of non-sectarianism and strives to create an inclusive learning environment that welcomes individuals from



diverse religious and cultural backgrounds. We affirm our dedication to providing an education that is free from religious bias, ensuring that our programs, activities, and policies are in full conformity with the non-sectarian requirement.

## **B. Educational Program**

1. Outline the instructional methods to be used by the proposed school, including any distinctive models being employed and what strategies, programming, and/or other special teaching techniques are planned.
2. (High Schools Only) Provide a detailed description of the strategies/course offerings that will assure that students can meet graduation requirements of the state and district. Explain how these requirements will ensure student readiness for college or other postsecondary opportunities (trade school, military service, or entering the workforce).

## **Instructional Methods**

Multiple studies both in the United States and abroad<sup>5</sup> indicate that the Montessori method leads to stronger outcomes in reading, math, social skills and executive functioning. According to one study<sup>6</sup> that followed a group of students who entered a Montessori Pre-K program via lottery and another group enrolled in traditional early childhood programming over time. “Montessori preschool[s] elevated children’s outcomes in several ways over time the Montessori children fared better on measures of academic achievement, social understanding, and mastery orientation, and they also reported relatively more liking of scholastic tasks. They also scored higher on executive function when they were four. In addition to elevating overall performance on these measures, Montessori preschool[s] also equalized

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<sup>5</sup> <https://pubmed.ncbi.nlm.nih.gov/33932226/>

<sup>6</sup> Montessori Preschool Elevates and Equalizes Child Outcomes: A Longitudinal Study  
<https://www.ncbi.nlm.nih.gov/pmc/articles/PMC5670361/>

outcomes among subgroups that typically have unequal outcomes. We believe that our proposed learning environment will achieve similar outcomes utilizing authentic Montessori methods, in conjunction with open-space classrooms with natural light, and natural materials essential to supporting instruction. Also, critical to creating an optimal learning environment is outdoor space for gardens and/or farm animals (goats, chickens).

The table below outlines the differences between a Montessori and Traditional School.

Montessori School	Traditional School
<b>Multi-age classroom:</b> often working with other children that are 2-3 years different in age	<b>Single age classrooms</b> and grade levels
<b>Focuses on the whole child,</b> emphasizing all aspects cognitive development	<b>Focuses on predetermined sequences</b> of cognitive development, along with an emphasis on social development
<b>Self-paced instruction:</b> students choose their own activities and work at their own pace	<b>Teacher-paced instruction:</b> curriculum is often set and the pace of learning determined by the teacher
<b>Curriculum varies</b> based on the child's unique interests and pace of learning	<b>One-size-fits</b> all curriculum that remains the same for each student
<b>Smaller ratios</b> of students per teacher – often taught in small group settings (P3 ratio will be 10:1)	<b>Average ratio of 25:1</b> students per teacher

<b>Freedom</b> to move about and speak at any time.	<b>Strict rules</b> , boundaries and schedules that structure where students move and when they speak
Learning is completed through <b>self-correction</b> and the students' desire for improvement	Learning is motivated based on a <b>punishment and reward system</b>
<b>Teachers serve as guides</b> that follow the student	<b>Teachers serve as the authority figure</b> which is always dominant to the student

The foundations of the Montessori curriculum encompass various domains, each designed to nurture a child's development:

#### 1. **Language:**

- Dr. Montessori emphasized the absorbent stage of children's minds from birth to six years, facilitating language learning from their surroundings.
- Montessori classrooms are rich in labeled materials, books, and language-related activities to immerse students.
- Practical life activities, like cleaning, are integrated into the curriculum to reinforce grace, courtesy, and social and emotional skills.
- Language materials, such as grammar boxes, aid in understanding sentence structure and syntax through hands-on, sensory methods.

#### 2. **Sensory:**

- Experiences engage students' senses, promoting exploration, discovery, and understanding.
- Cylinder blocks enhance visual differentiation, fine motor skills, and concentration.
- Touch boards with varied textures encourage sensory exploration and language development through tactile differentiation.

### **3. Practical Life:**

- Critical for independence, fine motor skills, and a sense of order.
- Activities include pouring exercises and grace and courtesy activities, fostering social skills.
- Repetition of tasks helps develop concentration and fine-tune motor skills, connecting children's hands to their brain development.

### **4. Math Station:**

- Activities involve counting beads, sorting objects, and matching numerals with quantities.
- The bead cabinet facilitates linear counting, skip counting, multiplication, linear counting, squaring, and cubing.
- Sensory activities support the exploration of various mathematical concepts.

### **5. Cultural Studies and Geography:**

- Teaches students about geography, history, science, art, and music.

- Geography lessons include physical and cultural aspects, exploring continents, countries, bodies of water, and landforms.
- Cultural geography introduces climates, fauna, flora, flags, and languages of different regions worldwide.
- Botany studies involve identifying plants and understanding their growth cycles through observation.

#### **6. Music and Art:**

- Songs and dances from different cultures are integrated into the curriculum.
- Art from around the world exposes students to various styles found in diverse cultures.

In each domain, the role of educators is crucial. For example, in Practical Life, educators prepare the environment with real, child-sized, breakable, functional, and culturally relevant materials. The goal is to model activities, allowing students to repeat them successfully. This holistic approach aligns with Montessori principles, fostering well-rounded development in young learners.

### **C. Curriculum Instruction and Design**

1. Provide a detailed description of the planned curriculum (grade by grade and/or subject by subject), including identified course outcomes and demonstrated alignment with current state standards.
2. Describe any curriculum emphasis planned for the school that targets a specific learning philosophy or style or has certain/selected subject areas as school themes.
3. Describe the overall plan to serve students with special needs, including but not limited to English Language Learners, students with Individualized Education Programs (IEPs) or Section 504 plans, student identified as academically gifted, and students at risk of academic failure or dropping out.

4. List the curriculum materials (textbooks, workbooks, etc.) contemplated for use in support of the proposed curriculum and describe the anticipated availability.

### ***Description of Planning Curriculum and Learning Philosophy***

P3 will utilize the standard Montessori curriculum that promotes individualized instructional plans but uses of practical life and sensorial activities, mathematics, and language. These areas of the classroom will have age-appropriate activities for all P3's students (ages 3-5) and will lay the foundation for learning throughout the child's life.

The learning philosophy the school will be following is the Montessori method of education developed by Dr. Maria Montessori and is a child-centered, development mentally based approach to education. The philosophy views the child as someone who is eager for knowledge who will self-initiate learning in a supportive and thoroughly intentional learning environment.

### ***List the curriculum materials (textbooks, workbooks, etc.)***

P3 is adopting NAMC's Individual Early Childhood Curriculum Manuals, recognized as the most comprehensive guide to the Montessori 3-6 classroom. These manuals cover Practical Life, Language (Oral Language, Writing, Phonics, and Reading), Mathematics, Geography, Cultural Studies, Music, and Arts. Montessori in the Public Sector has aligned this curriculum with state and common core standards.

P3's curriculum will seamlessly integrate the Montessori method throughout the school day, offering a diverse range of learning activities. Montessori programs prioritize exploration, fostering self-directed learning opportunities. Students actively participate in shaping their learning experiences, with teachers providing options through individualized learning plans. This freedom of choice encourages exploration, instills a sense of control over learning, and contributes to the development of lifelong learners. Exploration is foundational to Montessori Philosophy, emphasizing that students learn more deeply and quickly through natural and free exploration. This principle is woven into every aspect of the curriculum, fostering a spirit of curiosity and discovery.

To ensure a holistic education, P3 will utilize a Curriculum Map designed for each age group in the mixed-aged classroom. The Curriculum Map encompasses all areas of study and provides a structured yet flexible approach. An example of part of the curriculum map has been included in the appendix for reference.

### Typical Day

Period of Day	Activity	Purpose
<b>Arrival</b>  <b>7:00 am-8:15 am</b>	Students who arrive prior to school hours will have morning circle time.	Fostering a sense of community to start the day.
<b>Morning Work and/or Nature based</b>	Students spend this time working on individual activities at a table or on a rug.	Students have the freedom to choose activities from the prepared environment, such as practical life, sensorial, language, mathematics, and

<b>learning</b> <b>8:15 am-</b> <b>11:00 am</b>	Nature based- Students choose a natural, quiet and safe outdoor space like a garden, patio or shaded area to work comfortably.	cultural materials. This encourages concentration, exploration, and the development of intrinsic motivation.
<b>Transition Period</b> <b>11:00 am-</b> <b>1:00 pm</b>	This includes <b>Lunchtime</b> - Lunch is still part of the Montessori learning process in which students wash their hands and all students are seated prior to beginning, they will have a conversation and taste everything, upon the completion of their leftovers and trash and then remain seated until everyone is finished and dismissed.	This time promotes social interaction, sharing, and developing healthy eating habits.
<b>Outdoor Play</b> <b>1:00 pm–</b> <b>2:00 pm</b>	Students have areas that allow sand play, climbing, watering a small garden, and other sensory involved play. When weather is not conducive to outdoor play they are a combination of movement activities and games to be utilized.	Allows students to engage in gross motor skills, coordination and explore the natural world around them.
<b>Circle Time</b> <b>2:00 pm-</b> <b>2:45 pm</b>	This is group activities that include songs, games, stories, manners, and other classroom lessons.	It helps develop social skills, attention span, and listening abilities. At the same time fostering a sense of community and collaboration.
<b>Afternoon Activities</b> <b>2:45 pm-</b> <b>3:15 pm</b>	Pre-schoolers (3-year-olds) will go to the restroom, get a blanket and lie on their assigned mat. Lights are turned off and soft music is played to help them fall asleep.	Rest time (if applicable) Is a time for students to rest and recharge, it helps the students with self-regulating skills, mating a balanced energy level and rescue over stimulation.



	<p>Pre-Kindergarten (4-year-olds) Will rest quietly for 30 minutes then will continue to work on lessons from the Montessori curriculum in the morning. They will also receive lessons in science, art, writing, and music.</p> <p>Kindergarten (5-year-olds) Continue to work on the lesson from the Montessori curriculum in the morning. They will also receive lessons in science, art, writing, and music. Although time has been carved into the schedule for the opportunity to rest and/or nap according to their biological needs. Sticking with the Montessori method, rest time is optional, and students can continue with their morning curriculum and opt-out of rest time.</p> <p>Should the child choose to rest it will be important that students have a small blanket and optional pillow both clearly labeled in a bag that the child can carry independently.</p>	<p><u>Students are practicing their individualized approach and naps are based on students following their own personal rhythms and needs some children may naturally need or prefer a nap, whereas other will choose to continue to work. For those students who continue working there a respect of autonomy in which the Montessori philosophy places a strong emphasis on respecting the autonomy and choices of each child. If only half of the students choose to take a nap, it may be because the environment respects their individual needs and preferences.</u></p>
<p><b>After-Care 3:15 pm- 5:30 pm</b></p>	<p>Aftercare will be a Montessori-friendly extension to the school program. The program will be run by Montessori teachers and assistants which allow for continuity and consistency for the students in our care.</p>	<p>Share the achievements and challenges of the day and discuss what they have learned. This promotes communication skills, self-awareness, and a sense of accomplishment.</p>

### **Students with Special Needs**

P3 will provide a safe, equitable, and effective learning environment for students and Guides alike. We intend to use an evidence-based tiered

support framework to ensure a positive academic, social-emotional, and behavioral outcome. The methods will ensure students feel a sense of inclusiveness and a connection with peers while receiving collaborative support to ensure success.

### **Struggling Students**

P3 will provide all students with equitable and effective learning for all communities. We believe that all students learn differently, and we must provide various interventions and accelerations to meet students where they are and help them achieve their goals. P3 will utilize an evidence-based tiered support framework to ensure all students' positive academic, social, emotional, and behavioral outcomes. P3 will be an inclusive school, a place where all students are integral members of the classroom. All students feel connected to their peers and have a meaningful education that is rigorous and meaningful. Lastly, the students receive collaborative support as part of their pathway to success.

A "struggling student" is defined as a student needing to receive Tier 2 or Tier 3 intervention in the MTSS (Multi-tiered Systems of Support/Response of Intervention) framework based on the data that has been collected from the universal screener (MAP & STEP). The MTSS is a team composed of the Social Worker, the Interventionist (if applicable), and the Classroom Lead. This team will meet weekly to review and respond to student data, monitor progress, and develop and revise support plans for students receiving Tier 2 and Tier 3 academic and or behavioral interventions. The effectiveness of this program is continually evaluated at the data meeting with progress monitoring

as students' progress through and out of Tier 2 and Tier 3 interventions. The MTSS/RTI team will also serve as the primary catalyst for identifying students who may have a disability (Child Find).

Interventionists see mandated and struggling students and support them using evidence-based intervention strategies and programs. The programs are rooted in student data to meet students where they are both inside and outside of the classroom to help them achieve.

### **Students with Disabilities**

P3 will be deeply committed to ensuring the learning environment is inclusive, welcoming, supportive, and academically challenging for all our students, particularly those with disabilities. Additionally, (if applicable) P3 will employ special education personnel on staff who will act as the administrator for any necessary special education plans and services within the school and will serve as a liaison to any additional necessary outside service providers. A special educator will serve as the Child Find coordinator and guide the school's implementation of RTI by creating plans to support a range of student needs (Tier 2 and Tier 3 students) and building capacity within the school to improve student outcomes.

The intended program will be an inclusive model allowing P3 to serve students with special education needs in a general education setting, utilizing a special education teacher to provide push-in services. General educators and special education will have common plan time to collaborate and plan for instruction. P3 will be committed to being current and responsive in serving students with special needs. There will be a flexible program to meet the

needs of the students and promote increased student growth and achievement.

P3 will adhere to all provisions of federal law in relation to students with disabilities, including the IDEA, Section 504, and Title II and ADA, which are applicable as well—utilizing the special education personnel to take on additional duties to extend duties and responsibilities to ensure school's compliance. P3 will make available, as required by law, each student's special education and regular teacher (and any additional needed personnel) for IEP review meetings.

P3 will ensure families of children with special needs are informed of their student's progress on annual goals and in the general curriculum at least as frequently as the parents of general education students.

P3 will abide by all applicable laws and regulations of the IDEA and Family Educational Rights to Privacy Act of 1974 (FERPA) as they relate to students with disabilities, including, but not limited to, having a procedure for maintaining students' files in a secure and locked location with limited access.

### **English Language Learners**

P3 will allocate resources to provide special support services such as English Language Learners (ELL) instruction with a Montessori approach of scaffolding (a teaching technique where educators offer timely support and guidance assisting children in developing a higher level of skill and understanding). These supports will gradually build language proficiency for English Language Learners. Moreover, as required by the Oklahoma State Department of Education, we will administer the World-Class Instructional

Design Assessment (WIDA) to all English language learners within thirty calendar days of the beginning of the year.

### **Gifted and Advanced Students**

Montessori's approach to teaching and supporting gifted students is consistent with the overall philosophy of individualized and child-centered education. For example, inherent in the model is the practice of accommodating individual learning styles and pace, allowing talented students to progress through the curriculum at their own pace, allowing them to delve deeper into subjects of interest and move to more advanced material when ready. Additionally, Montessori promotes freedom of choice. Students benefit from the freedom to explore subjects that capture their interest, fostering a love of learning and intrinsic motivation. Additionally, Montessori-trained teachers observe and identify student's strengths and interests. Teachers can provide additional challenges and enrichment activities for gifted students to ensure continuous engagement and greater depth of subject knowledge.

### ***Kindergarten***

Unlike the traditional public or private kindergarten program, the P3 curriculum will always be tailored to each child's needs, one of the benefits of the small school model. No child is held back or pushed ahead in a reading or math group that may not fit their specific needs. Each student learns at their own pace and, with careful guidance from their teachers, will achieve at a level consistent with their capabilities.

#### **D. Admission Standards/Procedures**

1. Explain the plan for student recruitment and marketing that will provide equal access to interested students and families.
2. Describe the school's enrollment policy, which should include the following:
  - a. Non-discriminatory, open enrollment, and freedom of choice parameters.
  - b. A timeline for admission, including a deadline for receipt of, and timeline for registering students after admission.
  - c. Evidence that the school will require legal residence within the boundaries of Oklahoma City Public Schools for any and all applicants;
  - d. A description of the approach the school will use to seek to achieve racial and ethnic balance among its student population; and
  - e. A plan for an admission lottery if the number of eligible and qualified applicants exceeds the program capacity.
3. Designate, if applicable, a specific geographic area as an academic enterprise zone limiting admissions to students who reside within that area. (An academic enterprise zone must have a minimum of 60% of its students qualify for free or reduced lunch).
4. Provide an example of an application packet for parents and students describing eligibility criteria and qualifications for admission.

#### **Plan for Student Recruitment and Marketing**

P3 will utilize various media channels to market its program. The plan for student recruitment and marketing will be an ongoing effort based on the following focus areas:

**Website:** When using the website for recruitment, school activities, or advertising, P3 will adhere to the guidelines for internet use and access as follows:

- **Content Guidelines:** The school website will adhere to the Web Content Accessibility Guidelines (WCAG) standards.
- **Student Data Privacy:** Compliance with the Family Educational Rights and Privacy Act (FERPA) regarding the use and disclosure of student educational records.
- **Terms of Use and Privacy Policy:** Clearly outlining the terms of use and privacy for the website, informing users about data collection, usage, and protection.
- **Copyright and Intellectual Property:** P3 will ensure that website content complies with copyright and intellectual property laws.
- **COPPA Compliance:** If the website collects information from children under thirteen, P3 will comply with the Children's Online Privacy Protection Act, obtaining parental consent before collecting personal information.

#### **Radio:**

- Radio broadcasts for open house events and school open enrollment.

#### **Social Media:**

- Facebook and Instagram will be used for social media postings, ensuring news and school information reach parents and the community.

#### **Direct Mailer and Email:**

- Information about the school, enrollment, and eligibility will be shared through direct mailers and email to parents in the school's demographic area.
- Email blasts will include current events and opening information.

#### **Newspaper:**

- Newspaper ads may be utilized for recruitment and open house events.

#### **Outreach to Spanish-Speaking Families:**

- All school communications will be available in both English and Spanish.
- P3 will coordinate with the Latino Community Development Agency for outreach to the Spanish-speaking community in the northeast OKC area.

#### **Enrollment Policy**

##### **Non-discriminatory, Open Enrollment, and Freedom of Choice**

##### **Parameters:**

P3 will be a tuition-free public charter school open to students aged 3 and 4 in its initial enrollment year, focusing on Ward 5 and Ward 7 in the 73111 area (Northeast OKC). P3 does not discriminate in its programs and activities or employment decisions based on various factors.



- P3 will inform partners that it is the school of choice, adding information to the Parent/Student handbook and covering it during orientation and the application process.
- The lottery process will be explained to ensure adherence to the statute, giving enrollment preference to eligible students within the school district.

### **Timeline for Admission**

The school will start on July 14, 2025. Applications for the inaugural class will be accepted from February 10, 2025, to March 10, 2025. A lottery will occur if applications exceed capacity, with a face-to-face enrollment process afterward.

### **Legal Residence Requirement**

Applicants must have legal residence within the boundaries of Oklahoma City Public Schools. Specific requirements for utility bills and backfill positions are outlined.

### **Enrollment Plan:**

- Year one: forty four-year-olds (Class A).
- Year two: Class A transitions to Kindergarten, and 40 four-year-olds and 10 three-year-olds are admitted.
- Year three and beyond: Additional 40 four-year-olds and ten three-year-olds each year, maintaining a total of 90 students.

### **Educational Approach**

P3 follows Maria Montessori’s founding method, including three-year-olds, providing three uninterrupted years of Montessori education for solid academic, social-emotional, and executive function foundations.

### **Ages Served**

<b>Age</b>	<b>Y-2025</b>	<b>Y-2026</b>	<b>Y-2027</b>	<b>Y-2028</b>	<b>Y-2029</b>
3 <sup>7</sup>		10	10	10	10
4	40	40	40	40	40
5		40	40	40	40

### **Compliance with Statutes and Regulations**

P3 and Legacy Learning commit to comply with all applicable federal statutes and regulations, state statutes and regulations, and local ordinances and rules. This includes, without limitation, those pertaining to health, safety, civil rights, and insurance, as annually listed by the State Department of Education for Charter Schools and public-school compliance, in accordance with 70 O.S.§ 3-136.

### **Achieving Racial and Ethnic Balance**

To achieve racial and ethnic balance among its student population, P3 will adhere to State Department of Education guidelines. Charter schools are prohibited from limiting admission based on ethnicity, national origin, gender, income level, disabling condition, English proficiency, measures of achievement, aptitude, or athletic ability. Enrollment may include students residing within the school district boundaries or those who have transferred

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<sup>7</sup> Overseen by DHS.

into the district, with preference given to resident students. In cases where capacity is insufficient, a lottery system will be employed.

### **Lottery Process**

To address potential oversubscription, a lottery will be implemented during the school enrollment process. This ensures fairness and equal opportunity for all applying students, preventing bias or discrimination in admissions.

### **Specific Geographic Area as an Academic Enterprise Zone**

P3, situated in an Academic Enterprise Zone, will have a minimum of 60% of students qualifying for free or reduced lunch, based on the performance of other schools within the demographic area. Admissions will follow a 4-Tier process:

1. **Tier 1:** Age-appropriate students within the 73111 boundaries of the school district.
2. **Tier 2:** Age-appropriate children within the school district boundaries, but outside of the 73111 zip code.
3. **Tier 3:** Children outside of the school district but within the 73111 zip code.
4. **Tier 4:** Children within the borders of the school district.

### **Example of an Application Packet**

A sample application packet can be found in Appendix B.

## **E. Student Discipline**

1. Describe the planned approach to student discipline. This plan should include:
  - a. Practices the school will use to promote good discipline, including both penalties for infractions and incentives for positive behavior.
  - b. A preliminary list and definitions of the offenses for which students in the school must (where non-discretionary) and may (where discretionary) be suspended, respectively.
  - c. Methods to communicate discipline policies to students and families.
  - d. Procedures for due process when a student is suspended as a result of a code of conduct violation, including a description of the appeal process that the school will employ for student facing both short-term and long-term suspension.

### **Discipline Code and Practices**

P3 is committed to providing a safe and responsive school community where students feel secure in developing the skills and confidence to participate in the Montessori environment. We will partner with families to reinforce academic, behavioral, and socio-emotional expectations and systems. Our goal is to empower our students to do the right thing at all times, strengthen their ability to develop the skills needed to succeed and celebrate the good things that happen in their lives. We see social-emotional learning as critical to supporting the whole child. Our student-centered, hands-on learning approach requires that we see that students, families, and staff are people first and foremost.

P3 will use the Positive Discipline<sup>8</sup> approach created by Jane Nelsen Ed. D to guide its approach to managing student behavior. Positive Discipline is an effective way to manage misbehaving students in the classroom instead of using punishment or rewards. This method allows students to learn and alter their behavior to meet Montessori classroom expectations.

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<sup>8</sup> Positive Discipline. (n.d.). About Positive Discipline. Retrieved from <https://www.positivediscipline.com/>

This disciplinary model aligns well with the Montessori model because it assumes the best of children, collaborates with the child, and empowers them to develop self-discipline and problem-solving skills.

Positive Discipline does not rely on punishment such as threats, isolation, or random consequences to motivate children. The approach dictates that encouragement and support are what the child needs, and punishment is considered ineffective. The creator does acknowledge that punishments are effective in short-term scenarios, but she warns against their long-term effects.

Positive Discipline accepts children as social beings. In a traditional classroom setting, children are corrected for chattering amongst themselves when they "should be working." However, the Montessori model is a kind reminder that socialization is part of a child's nature. The teachers will succeed more when they create productive opportunities for children to have conversations. Therefore, Montessori and Positive Discipline seek to meet the child's needs, not mold a child into exhibiting behaviors that are not developmentally appropriate.

Positive Discipline posits that all behavior has a goal behind it. When a child misbehaves, adults often feel responsible for demanding retribution. We do not want the child to feel they can "get away with" improper conduct. Positive Discipline turns teachers from this way of thought and asks the teacher to instead focus on what caused the problematic behavior.

Lastly, a child's primary goal is to belong. Positive Discipline understands that all children desire to belong at the immediate human level. There is no greater human need than belonging. So, instead of assuming that

a child who acts out does not care to fit in, we must realize that they want to fit in more than anything. They do not understand how to do it. Once you shift your perspective, the reasons behind problem behaviors become much easier to discern and address.

### **Methods to communicate discipline policies to students and families**

The methods to communicate the disciplinary policies for students will be written in the student handbook with a form for parents to sign stating they have received the documentation. Teachers will also post and reintegrate with how students are conducting themselves.

### **Procedures for Due Process**

If students have violated the Code of Conduct, the disciplinary path will be a progressive discipline system in which support and high expectations from adults and students are expected to view logical consequences as a learning opportunity to make better choices in the future. The staff will have the mindset that any disruption to the learning community is unacceptable behavior. When the learning community is disrupted, the staff will consider the student's age, maturity, previous disciplinary records, and the incident's circumstances when issuing consequences for the disciplinary infraction. To promote the school's culture and address student behavior that is disruptive to learning, the staff will exercise a range of punitive responses. By law, with any disciplinary action, the student's IEP, 504 Accommodation Plan, or other noted plans will be reviewed when applicable.

Students with disabilities have the same rights and responsibilities as other students and may be disciplined for the same behavioral offenses. P3 staff and administrators will ensure it follows IDEA guidelines about disciplining students identified as having a disability.

### **Due Process**

1. **Clear Policies and Procedures:** These documents will outline the expectations for behavior, consequences for misbehavior, and the steps involved in the disciplinary process.
2. **Developmentally Appropriate Practices:** Discipline strategies will be developmentally appropriate for young children. This includes using positive reinforcement, teaching social-emotional skills, and employing strategies that consider the age and understanding of the child.
3. **Parent Notification:** Parents should be promptly informed if their child has been involved in a disciplinary incident. The notification should include details about the incident, the steps taken by the staff, and any consequences applied.
4. **Parent Involvement:** Due process will involve parents in the disciplinary process, creating a collaboration of strategies to support the students' positive outcomes.
5. **Documentation:** Thoroughly document all incidents, interventions, and communications related to student discipline.
6. **Appeals Process:** If the student or parent disagrees with a disciplinary decision, there should be an appeals process.

The final discipline plan, including the suspension process, will be drafted with Community parents, potential partners, newly hired teachers, and Board members. The Board will vote on the finalized draft at a later date.

Determination of who will handle suspension will also be determined at a later date.

## **F Student Assessment**

1. Describe the plan for assessing student performance in the core academic areas.
2. Describe the strategy to be employed to collect and report the baseline data against which student achievement growth will be measured.
3. Describe how student progress toward enhanced academic performance will be evaluated and compared with the progress of other closely comparable student populations.
4. Detail the instruments to be used and/or the methods of measurement planned relative to student performance. Include a calendar for assessing and reporting results.
5. Describe the methods to be used to identify, document and monitor academic strengths and needs of students.
6. Describe plans for student participation in the Oklahoma School Testing Program.
7. (High Schools Only) Describe the method to be used to track that students are meeting or have met state and local graduation requirements.

### ***Assessing Student Performance***

P3 plans to implement the Early Learning Quick Assessment (ELQA), a series of quick assessments designed to monitor progress in early literacy and numeracy skills during pre-kindergarten and kindergarten. These assessments are strategically administered at intervals throughout the school year, providing teachers with the ability to:

- Identify students at risk for not meeting early targets.



- Differentiate instruction to prepare students for kindergarten and beyond.

Assessments can be conducted three to five times per year, aiming to identify students at risk for not meeting targets. To keep parents informed, a Parent Conference report will be provided, available in both English and Spanish. Additionally, the ELQA assessment will generate individual student, classroom, and school-level reports.

If, for any reason, the ELQA assessment is deemed impractical or ineffective, alternative assessments will be explored after the first year of the school's opening.

Areas of accountability that will be monitored through the ELQA assessment are detailed in the table below:

**The ELQA includes the following:**

<ul style="list-style-type: none"> <li>• <b>ELQA Pre-K Literacy</b></li> </ul>	<ul style="list-style-type: none"> <li>• Assesses print concepts, phonological awareness, alphabet knowledge, and vocabulary.</li> </ul>
<ul style="list-style-type: none"> <li>• <b>ELQA Pre-K Numeracy</b></li> </ul>	<ul style="list-style-type: none"> <li>• Assesses numbers and operations, displaying and analyzing data, geometry, algebraic thinking, and measurements.</li> </ul>
<ul style="list-style-type: none"> <li>• <b>ELQU Kindergarten Literacy</b></li> </ul>	<ul style="list-style-type: none"> <li>• Assesses print concepts, alphabet knowledge, phonological awareness, phonics and word study, fluency, vocabulary, and comprehension.</li> </ul>

<ul style="list-style-type: none"> <li>• <b>ELQA Kindergarten Numeracy</b></li> </ul>	<ul style="list-style-type: none"> <li>• Assesses numbers and operations, displaying and analyzing data geometry. algebraic thinking, and measurement and data</li> </ul>
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The Ages & Stages Questionnaires® (ASQ®) will be used as a secondary assessment that focuses on physical and social-emotional development. The ASQ provides reliable and accurate screening metrics for children ages 0-6. Drawing on parents' expert knowledge, ASQ has been specifically designed to pinpoint developmental progress and catch delays in young children—paving the way for meaningful next steps in learning, intervention, or monitoring.

### **Intervention Assessments**

1. **Observations:** Regular observation is a fundamental part of the Montessori approach. Teachers carefully observe each child's interactions with materials, engagement in activities, and social interactions to identify areas of strength and areas that may require additional support.
2. **Individualized Learning Plans (ILPs):** Montessori guides can create Individualized Learning Plans (ILPs) for students who need targeted interventions. These plans outline specific goals, activities, and strategies tailored to the individual needs of the child.
3. **Progress Reports:** Montessori schools often maintain progress records for each child. These records include anecdotal notes, checklists, and other forms of documentation that track a child's development and academic progress over time.

4. **Parent-Teacher Conferences:** Parent-teacher conferences provide an opportunity to discuss a child's strengths, areas for improvement, and strategies for further support both at school and at home.

### **Participation in the Oklahoma School Testing Program**

Oklahoma School Testing programs begin in 3rd grade, which is outside of the grade bands which P3 will serve. Per Oklahoma state mandate, students in grades 3rd-8th and 11th are required by deal law to participate in annual testing.

In lieu of the state testing program, P3 will utilize the NWEA MAP, nationally norm-referenced, testing programs for students in Kindergarten year to ensure they are meeting grade-level standards prior to leaving Kindergarten—otherwise referred to as Children’s House, the age 5 level of the Montessori educational system.

**Student Conferences** will occur formally twice per year In addition to formal conferences, Montessori educators frequently engage in ongoing communication with parents. Informal meetings, observations, and check-ins may occur more frequently throughout the year to provide updates on a child's activities and address any immediate concerns.

### **G. School Accountability**

1. Outline the criteria to be used to measure the effectiveness of the charter school.
2. Describe how the school will meet the reporting requirements of the Oklahoma School Testing Program and the State Department of Education.
3. Describe how the school will respond to requests for data that may be received from and/or required by the State Office of Accountability.
4. Describe plans, if any, for periodic instructional programs and

curriculum audits for the school.

## **Accountability**

P3 is committed to aligning all instruction with the Oklahoma State Standards in Math, Reading/English, Science, and Social Studies for children in PreK through Kindergarten. All required Oklahoma state assessments will be administered as designated by the State Department of Oklahoma. P3 students will receive instruction aligned with the eight Overarching Reading/English standards outlined for PreK and Kindergarten students.

These eight standards encompass the content and competencies of English language arts, including Listening and Speaking, Reading and Writing Foundations/Process, Critical Reading and Writing, Vocabulary, Language, Research, Multimodal Literacies, and Independent Reading and Writing. The recursive nature of language arts involves the continuous and thoughtful refinement of concepts and skills. Each standard statement is accompanied by two strand statements—listening and speaking for Standard 1 and reading and writing for Standards 2-8. Each pair of strands contains grade-level objectives.

Standard 2, Reading and Writing Foundations, includes the five strands of Phonological Awareness, Print Concepts, Phonics and Word Study, Spelling/Encoding, and Fluency. The linear order of the strands suggests a learning progression from basic foundational skills to fluent readers and writers, expressed in terms of both reading and writing to support integrated instruction.

Research supports this integrated model, where students read to understand the meaning and composition of a text and write with readers'

expectations in mind. The standards' order suggests that students learn to read and write by listening and speaking (Standard 1) on their way to becoming independent, critical readers and writers (Standards 3 and 8). Speaking and listening skills continue to be developed as students' progress through grade levels, and concepts of independent reading and writing are introduced even in the earliest grades.

Independent reading and writing are natural outcomes of strong standards implementation through a rigorous curriculum. Standard 8 acknowledges students' need to grow increasingly independent for college and career readiness, emphasizing the significance of working independently and seeking opportunities for lifelong learning. These skills easily transfer to test-taking, civic engagement, and citizenship.

Students at P3 Montessori will also be taught all state standards for Numeracy. Throughout their experience, mathematically literate students will:

- Develop a Deep and Flexible Conceptual Understanding.
- Demonstrate accurate and appropriate procedural fluency.
- Develop strategies for problem-solving.
- Develop mathematical reasoning.
- Develop a productive mathematical disposition.
- Develop the ability to make conjectures, model, and generalize.
- Develop the ability to communicate mathematically.

Additionally, because P3 provides wrap-around services (before and aftercare) and serves 3-year-olds, it will be subject to the Oklahoma Human Services (QRIS) Quality Rating and Improvement System. The quality

standards include a commitment to minimum licensing requirements, effective management and administration, qualified and professionally developed staff, a focus on learning and development, strong family partnerships, and a commitment to program evaluation and continuous quality improvement.

## **SECTION 2. OPERATIONS PLAN & CAPACITY**

This section includes details about school governance, administrative leadership, personnel, and information regarding general operations of the proposed charter school.

### **A. Founding Group(s)/Individual(s)/Incorporator(s) & Legal Counsel**

1. Provide the names, addresses, background and experience, and references for those persons who composed the founding group and/or the initial incorporators (to include disclosure statements regarding criminal activities and any pending legal actions).
2. Provide the name, address, e-mail, and telephone number of the proposed schools' legal counsel, if any.

### **Founding Group**

The founding group of P3 consists of:

- **Board Chair, Cecilia Robinson-Woods, Ed.D:** Dr. Robinson-Woods is a career educator with 27 years of experience in public Education. Woods has led schools and non-profit organizations in Oklahoma, Missouri, and Connecticut. She has led organizations in both early learning and Pre K-12. The board chair will remove herself as an active board member upon approval of the charter application.
- **School Start-up Coordinator, Rosalyn Robinson:** Ms. Robinson has vast experience in training and customer service. She currently works with several non-profits and has a master's degree in organizational

management. Her strengths are her non-profit experience, customer service, and training.

### **Founding Group Support**

Although P3 only has two founders they also have the support of the Founding board which is composed of an additional 10 individuals.

### **Legal Counsel**

Legal counsel has not yet been established for P3. When counsel has been required, the Founding Board has sought out pro-bono counsel as needed. Upon getting authorized and receiving a school number, the school will begin applying for grants and with that funding secure legal representation.

### **B. Governing Board**

1. Describe how/when the governing board will be/was chosen.
2. List current board members' names, addresses, telephone numbers, and provide resumes.
3. Describe the steps taken, if any, to assure a governing board that represents a well-balanced group bringing together people with a range of professional skills capable of the organizational, financial, pedagogical, legal, and other tasks required to open and operate a functioning public school.
4. Describe how the board's composition reflects local representation.
5. Describe what steps will be/have been taken to maintain continuity between the founder's vision and that of the permanently established governing board.
6. Provide verification of fingerprinting and other background checks completed or planned for all governing board members and confirm that any exceptions noted will be disclosed to the Board of Education.

### **Describe how/when the governing board will be/was chosen.**

At present, the Founding Board is driving the development of the proposed school's design and policies. Upon approval of the charter, the

Governing Board will be established. At this time, the current Founding Board members will be appointed to terms in accordance with the P3's by-laws, assuming they are about to meet all applicable roles and responsibilities outlined in the by-laws and the terms of the Oklahoma Charter Schools Act with the expectation that they can uphold the requirement in accordance with the newly created by-laws.

The Governing Board will ensure the school complies with the most up-to-date changes in Charter Board requirements including residency, conflict of interest, meeting frequency, as well as Instruction and continuing education as stated in Oklahoma Statutes. §70-3-136.A.7

Legacy Learning's Board shall provide for a governing body board for the school which shall be responsible for the policies and operational decisions of the charter school or virtual charter school. All the charter school or virtual charter school board members shall be residents of this state and shall meet no fewer than ten (10) months of the year in a public meeting within the boundaries of the school district in which the charter school is located or within this state if the governing board oversees multiple charter schools in this state or oversees a virtual charter school.

The Legacy Learning Board shall be subject to the same conflict of interest requirements as a member of a school district board of education including but not limited to Sections 5-113 and 5-124 of this title. Members appointed to the governing board of a charter school or virtual charter school shall be subject to the same instruction and continuing education requirements as a member of a school district board of education and pursuant to Section 5-110 of this title shall complete twelve (12) hours of



instruction within fifteen (15) months of appointment to the governing board and pursuant to Section 5-110.1 of this title shall attend continuing education.

### **Current Board List**

#### **Board Chair Cecilia Robinson-Woods, Ed.D**

Ms. Robinson- Woods is a career educator with 27 years of experience in public education. Woods has led schools and non-profit organizations in Oklahoma, Missouri, and Connecticut. She has led organizations in both early learning and Prek-12. Her two children both attended public Montessori in Connecticut and Missouri and she has supervised public Montessori schools in her current role as Superintendent of Millwood Public Schools in Oklahoma. She is a National Blue-Ribbon Principal and serves on numerous Boards, holds local and state appointments, as well as volunteers in the Northeast OK community. She also currently serves as a member of the Founding Group.

crobiwoods@gmail.com

#### **Tori Perry**

Mrs. Perry is an advocate for the Northeast OKC community and is a former Montessori parent who paid private school tuition for her child to have a Montessori experience in OKC. Mrs. Perry is a fierce advocate for children, as evidenced by her service on the Positive Tomorrow Board. Mrs. Perry is a product of northeast Oklahoma City and has vested interest in the success of children in this area.

tperry1169@gmail.com

**Eddie Green, Jr.**

Mr. Green is a teacher in Oklahoma and a 7th-generation educator. He is also an alumni of the Montessori program, attending public Montessori from age 3 to 5th grade. Mr. Green's expertise centers around curriculum development and development of instructional staff.

eddiehgreen@gmail.com

**Kyaula Reed**

Ms. Reed is currently a Montessori teacher in Oklahoma. Her expertise regarding teacher training, the Montessori curriculum, and the collection of student data will supplement the Board's diverse skillset. Ms. Reed's ability to speak in real time about the implementation of Montessori, as she was a founding staff member of her school, will also be important on the Board.

Kyaulac@gmail.com

**Lyndsey Reyes**

Ms. Reyes is a non-profit leader that provides support to foster parents and marginalized families. She has managed a non-profit in Tulsa OK for over ten years. Mrs. Reyes's expertise in managing a non-profit is necessary to ensure compliance with non-profit guidelines.

lyndsey3032@yahoo.com

**Jesse Langston**

Mr. Langston is a retired OG&E Executive who is an advocate for quality learning opportunities for children and is also well-connected to

community resources. His expertise is in managing grants and access to corporate donors and partners.

jesselangston@sbcgkoba.net

### **Ayana Lawson**

Mrs. Lawson is a current private Montessori Parent and an OKC Thunder Executive who is passionate about improving access to public Montessori for children of color. Mrs. Lawson's experience with private Montessori in Oklahoma as well as her business acumen are important to bring balance and expertise to the Board.

alawson@okcthunder.com

### **Brittany Lee**

Ms. Lee is the current OKDHS Director of Childcare Services and has a wealth of knowledge regarding early childhood services, licensing, and DHS reimbursement. Mrs. Lee's involvement with the Board brings expertise to the Board in early childhood and service of families in marginalized communities.

brittany.lee@okdhs.org

### **Gary Woods**

Mr. Woods is a Community Leader (OKC Parks Board, Innovation District- STEM Education Chair) with access to resources and support. Mr. Wood's connections to the philanthropic community will be key in fundraising in the community.

cgwoodsinc@yahoo.com

## **Freda Davis**

Ms. Davis is a former Montessori parent and lifelong resident of Northeast OKC. Mrs. Davis has a background in security and can support by informing staff of important trends regarding student safety and security.

fredadavis1999@aol.com

## **Diversity on the Governing Board**

When establishing the initial board, the founding group aimed to develop a Governing Board of business leaders who all had the same passions about creating a Montessori school and helping build up a marginalized community in Northeast OKC. In addition, the founding group sought individuals also who were part of a strong diverse network that included non-profit leadership as well as members that have operational and program management experiences. Finally, the inclusion of educators and parents of former students of both public and private Montessori was paramount to balancing the Board.

The Board's composition reflects the local representation of the Northeast OKC population. The current racial makeup of the area is 83.2 percent African American, which mirrors the current board that is 83 percent African American. The Founding Group is seeking to diversify the gender of the Board by adding more male members. Currently, only three males serve on the Board comprising only 27 percent of its members. The surrounding community is 43 percent male.

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## **Ensuring Continuity with the Founder's Vision and the Established Board**

To uphold continuity between the founder's vision and the permanently established board, we will implement a comprehensive communication strategy. This involves effectively communicating the vision and obtaining clear feedback from all stakeholders. To foster a deeper understanding and commitment, potential board members will engage in trial collaborations. This may include participation in small projects or collaborations with existing board members before making a long-term commitment.

**Trial Collaborations:** Potential board members will be strategically placed in small projects or collaborative initiatives to assess their alignment with the organization's vision and values. This trial period allows for firsthand experience and ensures a shared commitment to our mission.

**Thorough Interviews:** Prior to joining the board, candidates will undergo thorough interviews. These interviews will serve as a platform to gauge the candidates' comprehension of the organization's vision and mission. Through this process, we aim to select board members who not only understand but also resonate with and actively support the core principles guiding our organization.

By incorporating these measures, we aim to build a cohesive and dedicated board that remains aligned with the original vision, fostering sustained success for our organization.

## **Verification of Fingerprinting and other Background Checks**

Upon appointing the newly established board the first order of business prior to making any public announcements of the board there will be fingerprinting and background checks of all individuals of the newly formed Governing Board. The new members will use the OSDE process to receive their background checks and fingerprinting. It will be the financial responsibility of the Board members to process what needs to be completed within one month of appointment. P3 Montessori will also employ two treasurers. Their job description can be found under the school job description sections for school employees. The full description of the Board treasurer has been provided under appendices.

For a summary of Board Treasurer Qualifications, please see Appendix C.

## **C. Duties and Responsibilities of the Governing Board**

1. Describe the roles and responsibilities of the governing board, including its relationship to teachers and administrators and whether any employee of the school is eligible to serve on the governing board.
2. Describe any business arrangements, partnerships or other affiliations of the governing board with existing schools, educational programs, businesses, or non-profit organizations.
3. Describe the governing board's responsibilities for the creation and monitoring of policies and for the operational decisions of the school.
4. Describe the planned meeting schedule of the governing board and how it will be communicated to stakeholders and constituents.
5. Describe the governing board's understanding of the conflict-of-interest requirements for board members under Oklahoma law.
6. Describe the steps taken to provide for the assumption of liability, to include tort liability, and the governing board's understanding of its status relative to entering into contracts, its ability to sue and be sued, and the prohibition against levying taxes or issuing bonds.
7. Discuss the proposed method for resolving conflicts between the governing board of the charter school and the Board of Education.

8. Submit copies of the school's articles of incorporation, bylaws, contracts and other legal documents as may have been executed to date or planned to be executed upon approval of the charter (contract).

## **Roles and Responsibilities of the Governing Board**

The governing board plays a vital role in supporting and overseeing P3, ensuring alignment with the mission and vision. The board's responsibilities encompass various aspects, promoting a culture of inclusion, financial stewardship, and adherence to legal and ethical standards.

### **1. Mission and Vision Support:**

- Understand and support the mission and vision.
- Foster a culture of inclusion among stakeholders.

### **2. Financial Oversight:**

- Monitor the organization's current financial position.

### **3. Community Engagement:**

- Understand community demographics and the school's role within it.

### **4. School Leadership Support:**

- Support the School Lead and oversee school actions.

### **5. Committee Governance:**

- Govern through committees, ensuring seamless operations and timely issue resolution.
- Committee meetings monthly, reporting to the full Board.

### **6. Public Advocacy:**

- Act as ambassadors and advocates to enhance public standing.
- Ensure financial backing and public support.

### **7. Legal and Ethical Integrity:**

- Monitor regulatory compliance at state, federal, and local levels.
- Uphold ethical and legal standards as part of fiduciary responsibility.

#### **8. Curriculum Oversight:**

- Understand the school's curriculum and its alignment with standards.
- Ensure compliance with legal and ethical standards.

#### **9. Employee Engagement:**

- Encourage employee attendance at board meetings for insights.
- Business Manager and School Lead required to attend meetings.

#### **10. Business Arrangements:**

- Confirm no existing business arrangements, partnerships, or affiliations.

#### **12. Policy Review:**

- School leadership drafts policies for board review.
- Amendments presented and voted on at subsequent board meetings.

#### **13. Communication with Stakeholders:**

- Regularly scheduled and special public meetings communicated through various channels.
- Stakeholders informed via the school website, newsletters, and written correspondence.

#### **14. Conflict-of-Interest Awareness:**



- Founding and governing boards understand conflict-of-interest requirements under Oklahoma Law.

#### **15. Legal Support:**

- Seek outside counsel as needed.
- Understand voluntary assumption of legal responsibility.

#### **16. Insurance Compliance:**

- Secure insurance meeting state and federal requirements.
- Submit annual certificates of insurance to the authorizer.

#### **17. Conflict Resolution:**

- Follow a standard process to resolve conflicts with the OKC Board of Education.
- Seek resolution through meetings and, if necessary, engage a mediator.

To view the Articles of Incorporation and Board By-laws, please see Appendix D. These roles and responsibilities ensure effective governance and sustainable growth for P3, fostering a collaborative and ethical educational environment.

### **D. Parent and Community Involvement**

1. Discuss the anticipated nature and extent of parental involvement in the decision-making responsibilities of the governing board.
2. Explain the process that the school will follow should a parent or student have an objection to a governing board policy or decision, administrative procedure, or practice at the school.
3. Discuss how the governing board will comply with both the Open Meetings Act and the Oklahoma Open Records Act.

## **Parent Involvement in Governance Decision-Making**

Given the governing board's role in establishing policy, direct parent involvement in decision-making processes will not be part of the board's functions. However, the board recognizes the significance of parent perspectives and values input during policy considerations.

- **Public Comment Period:**

A dedicated period for public comment will be incorporated into governance meetings, allowing any parent to voice their opinions. To streamline this process, a specific deadline for agenda placement will be established, ensuring a systematic approach to public input.

- **Parent Feedback on Policy Changes:**

For pivotal policy changes, the board will task the school leadership team with soliciting parent feedback. This engagement will occur through surveys, focus groups, and town hall meetings as deemed necessary. By actively seeking input, the board aims to incorporate diverse perspectives and enhance the overall decision-making process.

Through these measures, P3 remains committed to transparency and inclusivity, valuing the insights of parents as integral to the continuous improvement of policies.

## **Grievance Policy for Parent Concerns**

If a parent has objections to a board policy, decision, administrative procedure, or school practice, a grievance policy will be in place to provide a mechanism for voicing disapproval and seeking resolution.

### **1. Internal School Communication:**

- The initial point of contact for parents is the classroom teacher.
- If resolution is not achieved through teacher communication, the parent will be directed to speak with the School Lead.
- All parental interactions will be guided by P3's belief in positive relationships as the foundation for productive communication.

### **2. School Lead Intervention:**

- The School Lead will:
  - Seek clarification of the objection.
  - Ensure the objection is addressed in a confidential manner.

### **3. Appeal to the Board:**

- If the parent remains dissatisfied after discussions with the school staff, they have the right to file a formal complaint with the Board.
- The Board will address all complaints during the month they are submitted and will render a decision before the next month's Board meeting.
- Complaints will be heard in an Executive Session to maintain the privacy of parents and students.
- Decisions will align with school policies and guidelines.

### **4. Authorizer Appeal:**

- If parents are not satisfied with the Board's decision, they have the option to appeal to the school's authorizer.

Through this grievance policy, P3 is committed to addressing parent concerns transparently, maintaining confidentiality, and ensuring a fair and efficient resolution process.

### **Open Meetings Act and the Oklahoma Open Records Act**

The P3 board will comply with the Opening Meetings Act, as follows:.

Section 1. Amendatory 25 O.S. 2021, Section 304, is amended to read as follows: Section 304. As used in the Oklahoma Open Meeting Act: 1. "Public body" means the governing bodies of all municipalities located within this state, boards of county commissioners of the counties in this state, boards of public and higher education in this state, and all boards, bureaus, commissions, agencies, trusteeships, authorities, councils, committees, public trusts or any entity created by a public trust, including any committee or subcommittee composed of any of the members of public trust or other legal entity receiving funds from the Rural Economic Action Plan Fund as authorized by Section 2007 of Title 62 of the Oklahoma Statutes, task forces or study groups in this state-supported in whole or in part by public funds or entrusted with the expanding of public funds, or administering public property, and shall include all committees or subcommittees of any public body.

P3 will comply with Open meeting guidelines at all four types of meetings that could occur including regularly scheduled meetings, special meetings, emergency meetings, and continued or reconvened meetings The governance board will provide notice of the meeting as well as an agenda of the meeting.

The notice for the regular meeting must be provided annually by December 15th for the next calendar year. The notice will include the dates, times, and places.

Special meetings will have a 48-hour notice of the date, time, and location of the meeting.

- The agenda will be posted 24 hours prior to the meeting excluding Saturdays and Sundays. The agenda must list actions for the special meeting, the agenda will not be vague in nature, and new business will not be covered during a special meeting (that will only be permitted at regularly scheduled meetings).
- New business will be defined as “any matter not known about or which could not have been reasonably foreseen prior to the time of posting the agenda” as stated in the 25 O.S. § 311(A)(10)

The governance board of P3 will abide by the Open Records Act by designating an authorized person to release records. This will occur during regular school business hours.

All steps will be taken to ensure P3 remains in compliance with any Open Records.

- Request is made pursuant to the Oklahoma Open Records Act at 51 O.S. § 24A et. seq.
- The Open Records Act is a series of laws designed to guarantee that the public has access to public records of governmental bodies in Oklahoma.
- The Oklahoma State Department of Education believes in transparency and supports the public’s right to know.

- The process listed included via the Opens Records<sup>9</sup> The website was developed to ensure compliance with the Open Records Act and facilitate the public's right to access and review our records.

#### **E. Administration/Leadership**

1. Provide a detailed organizational chart describing all paid positions contemplated for the school in a) Year 1; and b) at full expansion.
2. Provide job descriptions for all leadership, management and supervisory personnel.
3. Provide a calendar that ensures the school meets all pre-opening conditions for opening prior to the beginning of the academic year.

#### **Organizational Chart for Year 1 and Full Expansion**

For a detailed Organization Chart for year one and full expansion, please see Appendix E.

#### **Job Descriptions**

For detailed Job Descriptions, please see Appendix F.

#### **Leadership Structure: School Lead and Business Manager**

P3's primary leaders are the School Lead and the Business Manager.

While the Business Manager reports to the School Lead on an organizational level, their roles are strategically divided to achieve excellence in their respective domains.

**School Lead Responsibilities:** The School Lead oversees the school program, focusing on:

- Strategic planning and setting long-term goals.

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<sup>9</sup> [Open Records Program \(oklahoma.gov\)](https://openrecords.oklahoma.gov)

- Curriculum development.
- Student recruitment and retention.
- Community engagement.
- Data analysis and assessment.
- Determining the academic vision and goals for the charter school.

**Business Manager Responsibilities:** The Business Manager manages compliance and accountability to state and federal regulations, with a focus on:

- Facilities management.
- Personnel oversight.
- Financial reporting.
- Staff recruitment and retention.
- Grant management.
- Financial planning and budgeting.
- Accounting and payroll.
- Purchasing and procurement.
- Risk management.
- Compliance and regulatory reporting.
- Human resources support.

**Collaborative Leadership:** While each leader has distinct responsibilities, both the School Lead and Business Manager are aligned with the overall priorities of the school. Effective communication between these leaders is crucial for the school's functioning. They work collaboratively to ensure

operational efficiency, supporting the overall success and sustainability of the school.

**Start-Up Team Coordinator: Rosalyn Robinson** Rosalyn Robinson serves as the Start-Up Team Coordinator with extensive experience in training and customer service. She currently collaborates with various nonprofits and holds a master's degree in organizational management. Her strengths lie in nonprofit experience, customer service, and training.

Rosalyn joined in May 2023 through a fellowship, working closely with the Oklahoma Public School Resource Center (OPSRC) to develop the charter school application and provide essential support during the start-up year.

Upon the school's opening, Rosalyn will transition to the role of Business Manager. The Board has identified another key team member with a bachelor's degree in human development and Family Services, a Master's degree in Family Child Studies, and certification in Behavioral Health Case Management II.

### **School Opening Preparations**

The school opening will be a partnership amongst the Founders, Founding Board, Community partners, Alpha Kappa Alpha Sorority graduate chapter as well as parents and residents of the community who have already focused their willingness to help. Ms. Robinson will continue to lead preparations for the opening of the school through the support of her OPSRC fellowship through June 2024. The Founding Group will be appealing to the Walton Foundation for supplemental start-up funding to continue preparations until such time that the school receives funding from its Charter School Program



(CSP) grant. The Timeline for the school's opening can be found in Appendix G.

## **F Employment Policy for Personnel**

1. Detailed descriptions of policies related to: a) employment contracts; b) certification issues; c) professional development provisions; d) personnel evaluation plans and procedures; e) suspension, dismissal and non-reemployment rules; f) sick leave, personal business leave, emergency leave, and family and medical leave provisions; and g) fingerprinting and background check requirements and expectations.
2. Specification of the set of salary, hours, fringe benefits, and working conditions for all employees by class of employment.
3. Plans for use of employer-employee bargaining, if any.
4. Plans for the disclosure of employment rights of employees in the event the charter school closes or the charter is not renewed
5. Anticipated participation in the Oklahoma Teacher Retirement System, if any.
6. Anticipated participation in the health and related insurance programs available to the employees of Oklahoma City Public Schools.
7. Plans for providing required employee' right to know training and documentation.

### **Employment Policies for Personnel**

All employment policies for personnel at P3 will align with state law and will be outlined in the Employee Staff Handbook provided to employees during the onboarding process.

- **Employee Contracts:** Employment agreements at P3 will generally be at-will unless otherwise expressly agreed upon and voted on by the Board. At-will employment is the default unless stated otherwise in a contract. P3 is committed to fair employment practices, ensuring

compliance with the Oklahoma Anti-Discrimination Act (OADA),

prohibiting discrimination, harassment, and retaliation.

- **Certification Issues:** P3, being exempt from state teacher certification requirements, will hire staff based on program needs. The School Lead and/or Business Manager will ensure hiring procedures comply with the law while prioritizing the most qualified individuals for the Montessori school model.
- **Professional Development Provisions:** Professional development, crucial for maintaining Montessori certification, will be provided throughout the year. A needs assessment and observations will guide the identification of topics. The School Lead and Montessori trainer will oversee the process.
- **Personnel Evaluation Plans:** The School Lead will conduct personnel evaluations based on data and assessments, supporting performance improvement and professional growth. The Board will use this information for decisions on continuing employment and supplemental compensation.
- **Suspension, Dismissal, and Non-Reemployment Rules:** Clear definitions for suspension, dismissal, and non-reemployment are provided, outlining the separation, discharge, or non-renewal of contracts for instructors. Notice for non-renewal may be given by May 15th.
- **Leave Provisions:** P3 acknowledges individual personal and health matters and provides various leave options. The Board and Business Manager will administer and document leave requests.

- **Fingerprinting and Background Checks:** All newly hired employees will undergo fingerprinting and background checks, with associated costs covered by P3.
- **Salary Policy:** Differentiated salary scales are established for Lead Teachers, Teacher Assistants, and Administrative Personnel, considering education, experience, and budget constraints.
- **Work Hours:** Standard work hours stagger from 7:00 am-5:30 pm, with flexibility for training and special days. Full-time staff will work the same hours on Professional Development, conference days, and teacher workdays.
- **Fringe Benefits:** Comprehensive medical, dental, and vision plans, along with a life insurance package, will be provided and paid by P3. Additional coverage for dependents is available at the employee's expense.
- **Retirement and Health Insurance Programs:** P3 will not participate in the Oklahoma Teacher Retirement System. Staff can set up a 401k through the school, and health insurance will be based on P3's programs.
- **Employee Right to Know Training:** P3 will provide "Right to Know" information during summer professional development and post all necessary documentation as required by law.

## Hiring Process/Procedure

### 1. Staffing Plan:

- Administrative Team: School Lead (1), Business Manager (1), Office Reception (1)
- Teaching Staff: Lead Teacher (3), Classroom Assistant (6)
- Support Staff: Food Service (1-2), Custodian (1), IT Personnel (1), Transportation (1)

2. **Hiring Process:** P3 seeks candidates aligned with the Mission and Vision statement, embodying a hardworking, goal-oriented, and Montessori mindset. The recruitment process includes captivating job listings, online job boards, networking, social media, job fairs, and professional development highlights. The process involves posting opportunities, candidate submissions, phone and in-person interviews, and extending offers contingent on background checks and required documentation.
3. **Qualifications:** P3 will provide qualifications information on the school website and inside the student handbook, including staff degrees, advanced degrees, experience levels, and the percentage of highly qualified staff.
4. **Target Staff:** The target staff for the initial year (2024-2025) is the School Lead and Business Manager. Classroom Leads will be hired in the summer before the inaugural year (2025-2026) and undergo extensive Montessori training.

## ***Student-to-Teacher Ratios***

<b>STUDENT-TO-TEACHER RATIO</b>					
	<b>2025-2026</b>	<b>2026-2027</b>	<b>2027-2028</b>	<b>2028-2029</b>	<b>2029-2030</b>
Total Students	40	90	90	90	90
Total FTE	4	9	9	9	9
Student-Teacher Ratio	10:1	10:1	10:1	10:1	10:1

## **H. Facilities**

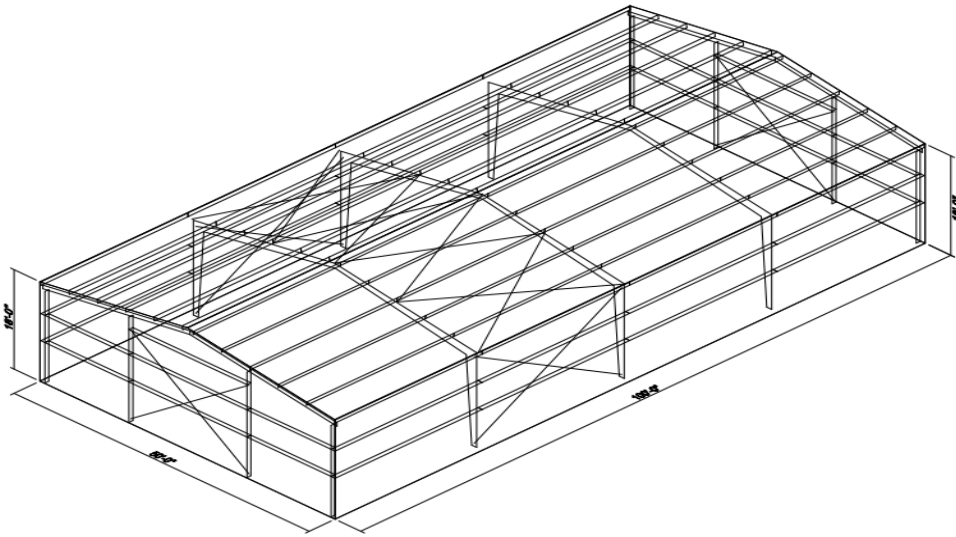
1. Identify any possible facilities and provide the locations for the proposed school.
2. Describe the basic facilities requirements for accommodating your school Oklahoma City Public Schools public including number of classrooms, square footage per classroom, common areas, overall square footage, and amenities. If not a Oklahoma City Public Schools facility, please provide a detailed site plan
3. If applicable, discuss any progress, partnership developments, or other future steps toward acquisition of a school facility. Describe any financial plans for the acquisition of the facility, if applicable.
4. Provide evidence that the proposed site(s) will be suitable, including evidence that the facility is properly zoned to house an operating common school program.
5. Demonstrate the safety and structural soundness of the school and compliance with applicable state/local building codes and fire protection codes, including written documentation of any inspections, or provide details of any plans to renovate and/or otherwise bring the proposed facility into compliance.

## ***Possible Facilities***

P3 has identified three potential facilities solutions: a Barndominium, an unoccupied grocery store, and the most likely option—an unoccupied church.

In the first year, regardless of the chosen facility, all three teachers and the School Leader will work in a single classroom, utilizing the skills acquired during the training prior to the school opening. Consequently, this classroom will be equipped for forty students and 4 adults, all aged four. From the second year onward, students will be divided into separate classrooms, initiating a mixed-age student environment. In year two, there will be 90 students with 1 Classroom Lead and 2 paraprofessionals in each classroom, totaling 30 children and 3 adults.

Option one, the Barndominium, is an attractive choice due to its cost-effectiveness, quicker construction time compared to conventional buildings, and flexibility in space management. It also incurs lower maintenance requirements and insurance costs. The Bromonium's proposed location is a piece of land near Washington Park at NE 4th Street and High Ave. An anonymous donor will cover the purchase cost of the Barndominium and a set cost at \$1.00 per month plus utility expenses would be the school's responsibility.



P3 is also collaborating with community leaders to secure land, either through sale or potential donation, which aligns with the minimalist nature of the Montessori Method. The board is committed to avoiding traditional school environments, opting for a space that accommodates the method's unique requirements. An open building floor plan, with the potential addition of dividers for teacher-specific time, is envisioned for the northeast OKC area. The target building size is 50\*100, providing 5,000 square feet of

uninterrupted space. At full capacity (90 students), 3,600 square feet will be allocated for classrooms, leaving room for additional Montessori common areas, restrooms. Kitchens etc.

Option two involves a vacant grocery store at 36th and Prospect, while the third option is partnering with a church that is only active on weekends. One potential church location is at 50th and Martin Luther King Ave, providing 4,000 square feet at a monthly rent of \$1,000 plus utility costs, covered by the school budget. Conversations between the Board and Church Leaders have already begun. Both of these options would require some renovations to ensure all the necessary components of a school, including restrooms, food service, safe room etc.

Other backup plans are also being considered.

All three locations are just in the preliminary stage. When one site is finalized, this will become the primary location and the other locations will be designed at the back-up location. The goal is to secure funding so that the school preparation can begin as soon as July of 2024, but no contract can be negotiated until P3 has authorization, a contract and school number, then facilities will be the first thing that is secured.

### **Elements of the Facility**

The following functional areas will be included to ensure that the school is operationally sound:



- **Entry and Reception:**

This multipurpose area serves as the first point of contact upon entering the school. It welcomes students and parents and acts as a communication hub for parents, administration, and staff. Reception handles incoming calls, admits visitors through a buzzer system, and maintains an updated bulletin board with school communication. The reception staff, stationed near the secured entry, ensures controlled access. The area also provides a comfortable waiting space.

- **Deliveries and Maintenance:**

A separate entrance handles deliveries, ensuring streamlined operations.

- **Entry Area:**

Adjacent to the entry, a space will showcase Montessori materials relevant for parents and staff. Natural elements, such as plants and nature-inspired artwork, will be incorporated into the space.

- **Business Areas:**

Close to the foyer, two offices will serve as workspaces for administration and allow confidential discussions with teachers or parents as well as a space for a locked cabinet for security purposes.

- **Kitchen Area:**

Designed for supplies and a commercial-size refrigerator, this space will support food services. A cafeteria area is unnecessary due to the Montessori-based classroom eating structure.

- **Maintenance Room:**

This area stores the HVAC system away from the learning environment and includes a washer and dryer for cleaning school linens and students' clothes (if space permits for this amenity).

- **Outside Area:**

Designed to accommodate parking needs, landscaping and design features will create a welcoming entry. The connection between indoors and outdoors will be emphasized, and the playground will provide ample square footage for outdoor learning and activities. Water-resistant furniture may be included for outdoor workstations, and if space allows, a nature/gardening area for students.

- **Proper Zoning:**

The school will be properly zoned to house an operating common school program, conforming to applicable rules and regulations. Zoning will adhere to the Oklahoma statutes and the OKC Plan 2000-2020.

- **Codes and Compliance:**

Square footage requirements will be met through collaboration with OPSRC and their architect. Additional checks will ensure compliance with:

- International Building Code (IBC)
- Accessibility Standards (ADA)
- Fire Codes
- Electric Codes (NEC)
- Mechanical Codes
- Plumbing Codes
- Energy Efficiency Codes

- Structural Codes
- Environmental Health and Safety Requirements
- Local Ordinances

This comprehensive approach ensures the school meets safety, accessibility, and regulatory standards.

### **Safety and Structural Soundness of the School**

Prior to the school opening date, P3 will ensure the facility is in compliance with applicable state/local building codes and fire protection codes, including written documentation of any inspections plus any additional inspections performed during the construction of the school. P3 will hire a local project management team to perform a walk through with the Board's facilities committee to ensure everything is up to code before the scheduled open houses which is also ample time before the school's start date.

Should an appropriate building that meets the needs of P3 be located, the Board will decide whether to open in an existing structure. Any necessary modifications will be made to ensure that the facility can be licensed per DHS codes and standards.

### **I. Transportation**

1. Provide the school's decisions and rationale relative to the provision of transportation in accordance with Sections 9-101 through 9-118 of Title 70 of the Oklahoma Statutes.
2. Provide a description of the transportation plans, if any, for workable, fair, non-discriminatory and cost-effective processes and procedures to safely transport students to and from school. How will the school assure that transportation is not a barrier to equal access for all eligible and interested students?

3. Describe any planned arrangements that will be made with private providers or Oklahoma City Public Schools relative to transportation services.
4. Describe the provisions for providing to parents/guardians the necessary information regarding transportation, if any, at the time the student enrolls.

### **Provision of Transportation**

P3 will not have any planned arrangements with any private providers for transportation services. In and all transportation will be the responsibility of the Parent and/or Guardian. During the enrollment process, the parents will be informed of the transportation policy. Provisions will be made as necessary regarding transportation to learning activities in the community.

Transportation will be the parents' responsibility and the school will rely on the Parents to communicate transportation details. It will be important to proactively inform the school of any changes and to stay engaged with the school communication avenues. In addition to that the school may implement some form of technology solutions, such as a transportation management system in order to facilitate a communication system between parent and the school in regards to the student commute.

Student transportation for homeless students will be provided and P3 will follow the McKinney Vento act for enrollment, education and transportation needs. The School Lead will be the local liaison for the school. Students with special needs will also be contracted for services. Lastly, student field trips will also occur via contacted transportation services.

### **J. Child Nutrition Services**

1. Discuss the school's plans for providing food service for faculty and students.

2. Describe any arrangements that will be made with any private agency for providing food services.
3. Describe the plan for meeting reporting requirements and for documenting annual sanitation certification.
4. Describe procedures to process free/reduced lunch applications for eligible students.
5. Describe the planned cafeteria or other eating facility to include description of equipment, sanitation, and capacity parameters.

### **School Nutrition Program**

P3 understands that the food service program or School Food Authority (SFA) will enter into a 1 year agreement with an optional renewal of four 1 year renewals. P3 will be required to adhere to the federal nutrition standard set by the US Department of Agriculture (USDS). School Food Authority (SFA) and Food Service Management Company (FSMC). Other nutrition plans P3 will apply for if applicable would consist of: National School Lunch program (NSLP), School Breakfast Program (SBP), After School Snack Program (ASSP-NSLP), Fresh Fruit/Vegetable program (FFVP), Special Milk program (SMP), Summer Food Service Program (SFSP), and lastly seamless Summer Program (SSP-NSLP).

Prior to finalizing a facilities contract we will ensure the facilities kitchen area is accommodating to provide food services as required by the Oklahoma health department. Also, due to the fact the school will also have 3 years the facilities food service area will also need to be approved by Oklahoma Department Human Services.

### **Food Services Pricing Breakdown:**

Estimated revenue for food services will be \$72,000 and estimated expenditure for food services will be \$76,500.00. The prices and meal

programs could vary due to students' eligibility for free, reduced-price, and full price meals which will not be determined until after school enrollment and a determination of qualifications for each student.

### **Financially Viable**

The budget is financially viable and P3 understands it is crucial for the success and sustainability of the Charter school to stay within the planned budget. P3 will stay realistic and update the budget to ensure the school remains financially viable year round.

### **Safety Compliance**

School maintenance staff will be charged with ensuring that we are in compliance with all health inspections of Public Law 108-265. Therefore, the facilities will be accommodating for meeting both Oklahoma Health department as well as Department of Human Services requirements.

### **Provision of Food Services**

The School will participate in one or more of the following: USDA National School Lunch Program, School Breakfast Program, After-School Snack Program, and Fresh Fruit and Vegetable Program in cooperation with the OSDE Child Nutrition Services under the provisions outlined in the Agreement for Food Services template that has been approved by USDA and the OSDE. It may participate via contract with a meal service vendor. The School shall be responsible for the Child Nutrition Agreement, Renewal Agreement, Permanent Policy Statement, and all other reporting requirements required by USDA and/or the USDE. Meals will be prepared by an outside

service company and served to the students in their classrooms. The programs that P3 will specifically use will be discussed and finalized with the Board. P3 is currently vetting a private food service contract with Keystone Good Service. Currently, Keystone is the only Oklahoma owned K-12 food service provider. If pricing does not meet P3s final budget plan, food services will be done in house with workers that are contracted through the school preventing a full-time food server on payroll.

### **Reporting Requirements**

The School will comply with the Health Inspections of Kitchens Section 111 of the Child Nutrition and WIC Reauthorization Act of 2004 (Public Law 108-265) amended Section 9(h) of the Richard B. Russell National School Lunch Act regarding health inspections required in schools participating in the NSLP or SBP.

P3 must obtain at least two health inspections each school year. The Health Department must conduct the inspections. In addition, it must post, in a publicly visible location, the most recent health inspection and provide a copy of the health inspection report to a member of the public upon request. If the School does not receive the required two inspections per year, the School shall contact the Health Department to request that the inspections be conducted; the date and name of the person spoken to concerning this matter shall be documented. P3 will report the number of health inspections annually to the OSDE through eClaims by the School prior to the submission of the September claim for reimbursement.

Oklahoma law, Title 63 O.S. 2011, §§ 1-106.1(E) and 1-1118, and Title 75 O.S. 2011, § 314(C)(1), requires institutions such as the School to pay annual license renewal fees of \$100 per site to the Oklahoma State Department of Health. This fee is necessary to support the continued operation of food sanitation programs, including facility inspections conducted by the Health Department.

### **Process for Free/Reduced Lunch Applications**

The Business Manager will be trained in the Application Process, Benefit Issuance, Verification, and Meal Counting and Claiming (ABVM) process annually as required by the USDA and OSDE. Free/reduced lunch applications will be distributed during the enrollment process and collected in a school office. Staff will approve the application within 10 days of receipt of the application. Each application shall be approved either electronically through a computer-assisted application or shall be reviewed by two staff members to ensure that the application has been properly approved and that benefits have been properly assigned.

### **Planned Cafeteria Space**

In keeping with the Montessori model P3 will not have a traditional cafeteria setting. Students will eat breakfast, lunch and snacks in their classroom in keeping with traditional Montessori practice. Students play an integral role in the set-up and clean-up rituals, gaining ownership over their meals. In this process, students spend the necessary time needed setting the table for their classmates and figuring out how to work cooperatively in



creating elaborate arrangements and rearrangements of the plates and silverware. All the activities in the day of Montessori students are built in as lessons, including meal and snack times.

The kitchen area will have ample room for preparation for food and or food preparation area to be delivered to the classroom. The food will be brought into the classroom using the contracted food services means of transporting food, the students will have their daily ritual of sanitation practice before getting their food and sitting in the area designated for meal and snack times.

#### **K. School Calendar**

1. Discuss the annual academic schedule for the school.
2. Provide the school's proposed calendar for the first three (3) years of operation, including start/end times, total minutes of instruction each day, and total number of instructional days each year. Explain how the calendar reflects the needs of the educational program.
3. Provide clear intention relative to either conformity to or variances from the published Oklahoma City Public Schools school year calendars.

#### **Pre-Service Training**

During the pre-opening period, P3 plans to partner with Cross Timbers Montessori Training. Cross Timbers Montessori Training has a history of training educators, including providing training to all the Montessori educators at the three Montessori schools based in Tulsa, Oklahoma. The training will be a 7-calendar week summer intensive training and week 8 will be hands-on training pre-service support for the three classroom leads to set-up their classrooms for the school year.

## **School Calendar and Start and End Times**

For a detailed school calendar, please see Appendix H. The planned school start time will be from 8:15 am-3:15 pm with before care from 7:15 am-8:15 am and aftercare from 3:15 pm-5:00 pm. The school will offer six hours of instruction, five days per week.

P3 intends to operate on a year-round calendar. The reason for a year-round schedule is to reduce the loss of Montessori instructional time during the summer when the students will be placed into a different childcare program. Year-round school also allows a more consistent learning pace throughout the year, preventing the period of disengagement that can occur with long breaks away from school. Regular staff professional development will be incorporated throughout the year to ensure the guides stay up-to-date with the latest research and best practices in the field of Montessori education. As we get closer to the timeframe of the school opening a specific scope and sequence for professional development will be incorporated into the school calendar.

## **Variation from the OKCPS Calendar**

The school calendar will not perfectly align with OKCPS due to the fact school will occur year-round. P3 will do their best to ensure Christmas, Thanksgiving, and Spring Break will align which will assist families with children attending multiple locations. While we recognize that different schedules can be a challenge for families, we also know working parents struggle to find summer care and school break care, especially for the

youngest children. Our hope is that the year-round schedule will help working parents by alleviating the need for extended gaps in childcare.

### **SECTION 3. FINANCIAL PLAN & CAPACITY**

#### **A. Financial Plan**

1. Present a financial plan, including cash flows, for the first three (3) years of operation.
2. Present a budget for start-up expenses covering the planning and capital expenses necessary before school opens.
3. Present a budget including all projected sources of revenue, both public and private, and an outline of planned expenditures for the initial term of the charter.
4. Describe competent financial management and internal accounting procedures for the school.
5. Describe plans to conduct any fundraising efforts to generate capital or to supplement state/local allocations.

#### **Financial Plan for the School**

##### **Budgeting Process**

P3 has developed a comprehensive financial plan, budget, and cash flow projections for the initial five years of operations. The school is committed to adhering to reporting requirements, financial audits, and audit procedures mandated for public school districts in the state of Oklahoma.

The budget preparation process will commence with a needs assessment conducted annually by the School Lead and Business Manager. This assessment will inform the allocation of funds across various areas, including staffing, benefits, professional development, instructional materials, technology, maintenance, and other essential resources. Prioritization will be based on aligning goals with the school's educational mission and objectives.

Revenue projections will be outlined in the budget, considering state and federal funding, local grants, carryover from the previous year, and potential DHS funding for before and aftercare. The budget will also address expense allocations, covering salaries, benefits, maintenance, instructional materials, and extracurricular activities.

The budget documentation will be organized into focus areas aligned with the school's operational structure. The proposed budget will be presented to the Board for approval. Feedback from the Board will be considered, and adjustments will be made as required. Once approved, the school will notify all relevant parties of the budget details, allocation of funds, and any associated tax implications.

Regular monitoring throughout the year will be conducted by the School Lead and Business Manager, with oversight from the Board, to make necessary adjustments and ensure adherence to the budget. At the end of each fiscal year, a comprehensive annual audit will be conducted in compliance with state, federal, and charter guidelines.

P3 will utilize one of the three Oklahoma Cost Accounting Systems (OCAS) as adopted by the State Board. By September 1st of each year, the Board will prepare a statement of actual income and expenditures for the preceding fiscal year.

## **Revenues**

Primary funding sources include State Aid, Redbud school grants, federal funding (IDEA, Title I, Title II, and Migrant Education Program State Sub-Granting), private funding grants, DHS licensing, and reimbursable

snacks. P3 intends to apply for a federal CSP grant to assist with start-up expenses, focusing on increasing the number of high-quality charter schools serving educationally disadvantaged students.

### **Expenses**

Salaries and benefits constitute the largest portion of expenses, including two full-time administrators, one full-time receptionist, three school leads, six classroom paras, a part-time special education instructor, and benefits. Intentional salary increases based on merit and cost of living adjustments will be implemented while maintaining the budget at the target percentage of 65% of the full year's allocations.

During the implementation year, significant expenses will be incurred for purchasing furniture for classrooms and other school areas, both indoors and outdoors. P3 aims to shop around for the best prices from various vendors.

Professional development for teachers, including summer intensive training, will be a priority. The cost for this training process and certification is estimated at \$28,500.00, which P3 intends to include in the CSP grant application.

### **Cash Management**

P3 plans to maintain 10-15% of funds at the end of each fiscal year for carryover, ensuring needs are met during July when schools do not receive funding. Monthly or quarterly administrator meetings will manage carryover with Board approval. In the first three years, carryover will be kept low to

control unexpected costs, with additional grants sought from local funding sources.

### **Budget Review and Audit**

An annual budget review and external audit, scheduled by April 1st of the previous school term, will be conducted. The State Auditor, State Inspector, or The State Department of Education may also conduct financial, program, or compliance audits. An independent external audit will be conducted yearly by June 1st of each contract year.

### **Fundraising Efforts**

The Board will actively seek outside funding through grants or donations. P3 will explore grant opportunities from New Schools Venture, Opportunity Finance Network, Charter School Development Corporation, and others. The board will work with philanthropic entities supporting early childhood education and host annual fundraising events. In-kind donations will also be actively sought to contribute to P3's financial stability. The founding Board, Legacy Learning, will continue to function as the fundraising arm with an annual fundraising goal.

### **B. Finance Expertise**

1. Provide a description of the treasurer's qualifications and the qualifications of any other officers or persons who shall have primary responsibility for finances.
2. Provide evidence that the treasurer has demonstrated experience in school finance or the equivalent thereof

### **Treasurer's Qualifications**

P3 will have the following three duties assigned to personnel or contractors to ensure the school is fully equipped in ensuring all the financial

roles are being met and aligning with State requirements. There will be a school treasurer, an encumbrance clerk. The full job description can be found for these roles can be found in Appendix J.

### **Treasurer Experience**

The role of treasury has not been filled for the Board or school treasurer, but we understand the importance of when we are to fill the role we will ensure the right individual who possesses the skills, qualifications, and commitment necessary to contribute to the School mission and enthusiasm to help the school succeed. The approach that will be used involves carefully identifying a consultant familiar with working with small schools, diversified funding sources (federal, state and grants) as well as OCAS knowledge. There is no shortage of consultants that work with small schools that will respond to an RFP.

### **C. Audit & Reporting**

1. Provide a clear understanding of the annual requirement for a financial audit, audit procedures, and financial reporting for local school districts in Oklahoma.
2. Certify that the school shall use the Oklahoma Cost Accounting System to report financial transactions to Oklahoma City Public Schools.

### **Audit and Reporting Procedures**

P3 will implement the below practices to ensure financial compliance.

- **Annual Audit Requirements:** Local schools in Oklahoma are mandated by state law to undergo an annual financial audit. The requirement is designed to ensure that schools and school districts maintain accurate financial records, adhere to fiscal accountability, and

comply with state and federal regulations. The audit is conducted by external independent auditing firms that are approved by the Oklahoma State Auditor and Inspector's Office.

- **Audit Procedures:** The audit process involves a thorough examination of the school's financial records, transactions, and internal controls.

Which usually includes:

- **Risk assessment:** the financial risks associated with the school's operations and transactions
- **Review of Financial Statements:** Analyze the financial statements, including balance sheets, income statements, and cash flow statements.
- **Review Policies and Procedures:** Assess the financial policies and procedures for adequacy and alignment with best practices.
- **Substantive testing:** Auditors perform substantive testing on financial transactions, account balances, and records to ensure accuracy and compliance.
- **Internal control evaluations:** Auditors review the effectiveness of schools' internal controls, including procedures to safeguard assets to prevent fraud.
- **Financial reporting:** Upon the completion of the audit procedures, the audit firm prepares a comprehensive report that includes:
- **Auditor's Opinion-** The audit report includes the auditor's opinion on the fairness of the financial statement and whether they are presented accurately in accordance with General Acceptance Accounting Principles (GAAP).



- **Management Letter:** This letter highlights deficiencies in internal controls or areas of improvement identified during the audit process.
- **Financial statement-** The audited financial statement presents the school's financial position, results of operations, and cash flows for the fiscal year.
- **Notes to Financial statement:** Additional details about specific accounting policies, significant transactions, and other relevant information.
- **Supplementary information:** The reporting may include supplementary schedules and disclosures that will provide further insight into the school's financial activities.

**Certification that the School will Use the Oklahoma Cost Accounting System to report financial transactions to Oklahoma City Public Schools.**

Both the Governing Board and the Founding Team are aware of the requirements for charter schools to use the Oklahoma Cost Accounting System to report financial transactions and assure the district that P3 will meet all applicable requirements. School funding software, such as Trends will be acquired to ensure compliance with state funding/coded requirements.

**D. Insurance Coverage**

1. Explain the manner in which the school will be insured.
2. Present the school's insurance coverage plans, including applicable health, general liability, property insurance and directors and officers liability coverage.

## Insurance

P3 at the time of receiving a school number will secure an insurance provider that will ensure the school is insured in all the necessary areas.

- **Health Insurance** - This can include medical, visual, and dental.  
Health insurance ensures that the staff can access necessary healthcare services and treatment in case of illness or injury. Staff at P3 will be provided with the opportunity to be covered by state sponsored insurance.
- **General Liability Insurance**- General liability insurance protects the school against claims of bodily injury, property damage, or personal injury arising from accidents or incidents that occur on the school premises or as a result of school activities. It also covers legal defense costs and potential settlement judgements. We will work with local vendors to ensure the best coverage is available to our school.
- **Property Insurance**- Provides coverage for damages or loss to the physical assets of the school, including building, equipment, furniture, and supplies. This coverage typically protects against perils such as fire, theft, vandalism, and natural disaster. We will work with local vendors to ensure the best coverage is available to our school.
- **Director's and Officer's (D&O) Liability Insurance**- provides coverage for the personal liability of the schools director, officers, and board members. It protects them against claims alleging wrongful acts, errors, omissions, or breaches of duty in the performance of their duties. This insurance is important for protecting the personal assets of individuals serving in leadership roles.

- **Workers Compensation Insurance-** Provides coverage for medical expenses, lost wages, and rehabilitation costs for employees who sustain work-related injuries or illnesses. This coverage ensures that employees receive benefits while protecting the school from potential lawsuits related to workplace injuries.
- **Professional Liability (Errors and Omissions) Insurance-** Provides coverage or claims arising from professional services or advice provided by the school's staff. This coverage is particularly relevant for educational institutions as it protects against claims of educational malpractice, negligence, or failure to provide adequate instruction.
- **Cyber Liability Insurance-** Provides coverage from losses or liabilities resulting from data breaches, cyberattacks, or other cyber incidents that may compromise sensitive information held by the school, such as records or financial data.

### **III. CHARTER SCHOOL ADDITIONAL EXHIBITS**

#### **A. Demonstration of Support**

Provide evidence of support from residents who may include, but not be limited to, surveys or petitions. Document, to the degree possible, support among teachers, parents, students, community members, institutional/community leaders, and other groups or organizations.

#### **Demonstration of Support**

To view details on P3's Demonstrations of Community Support, please see Appendix K.

#### **B. Evidence of State Department of Education Training**

With your Proposal, provide documentation that the Applicant has completed mandatory charter school training provided by the State Department of Education on the process and requirements for establishing a charter school, as specified in Okla. Stat. tit. 70, § 3-134(A).

### **Evidence of State Department of Education Training**

For evidence of the State Department Training, please see Appendix L. Training was completed on August 31, 2023, by Rosalyn Robinson.

### **C. Final Documentation**

No later than two (2) calendar weeks (fourteen days) prior to the first day of school operation, the board of the charter school shall:

1. Certify that it has complied with all applicable laws, ordinances and codes of federal, state, and local governments. Such certification shall include compliance with the Americans with Disabilities Act, as it may apply.
2. Provide all necessary licenses, permits, user approvals, facility certifications, and other approvals as required for use of the planned facility as a public school by the local governmental entities and/or other governmental agencies as may be necessary. If the governing board fails to provide such documentation, the charter contract shall immediately terminate with no compensation due to the school. The charter contract will include this termination condition.
  - i. The governing board shall further agree that all costs for or associated with complying with local ordinances; securing licenses, permits, use approvals, or facility certifications; and/or any costs associated with any other approvals shall be paid by the school and from its resources. Such costs shall include but not be limited to application fees, legal advertising costs, survey costs, plan review fees, permit costs and licensing costs and any other additional charges or surcharges by the local government or any other governmental agencies.

In addition, no later than fourteen (14) days prior to the opening of school, the governing board must certify, in writing, that it:

1. Has followed and/or implemented all federal regulations and state and local rules and statutes relating to health, safety, civil rights and insurance.
2. Has complied with all federal and state laws relating to the education of children with disabilities in the same manner as a school district.
3. Shall not use the charter school as a method of generating revenue for students who are being home-schooled and are not being educated at the charter school site.
4. May not charge tuition or fees for any student.
5. Must comply with the student suspension requirements of the State of Oklahoma.

6. Commits not to allow/encourage student resignation and/or transfer in lieu of suspension/expulsion.
7. Has secured the necessary insurance coverage to properly protect the state's investment in the school.

I certify that I have read the above section entitled "Final Documentation" and understand the requirements for meeting the conditions of this section by no later than fourteen (14) days prior to the official opening of the school.

Signature of Applicant	Title/Office	Date
Signature of Notary Public	Date	

The applicant should submit an original and eight copies of the charter application.

The board will accept or reject the application within ninety (90) days of receipt of the application at a lawfully convened meeting of the board of education. Notification of the acceptance or rejection and the reasons therefore, will be provided to the applicant in writing. If the proposal is accepted, the board shall notify the State Board of Education of the sponsorship. If the proposal is rejected, the applicants may resubmit a revised application for reconsideration within thirty (30) days after receiving notification of the rejection. The board will respond to the revised application within thirty (30) days. If rejected again, the applicant may appeal the decision to the State Board of Education in accordance with the Act.

The Oklahoma City Public Schools feedback cycle is intended to provide the applicant with the application's strengths, areas of concern and questions, as gathered by members of the Charter School Application Review Team. Feedback is not meant to coach the applicant on how to develop an application. Additional questions and requests for information may be directed to the applicant based on the capacity interview and the application details. During the initial 90-day review process, the applicant will receive an executive summary for their application in advance of board action. The initial feedback is not intended to allow the applicant to submit a revised application.

### *Appeals Process*

Should the application be denied, the applicant should use the executive summary to make changes to the original application. After resubmission, the Charter School Application Review Team will reconvene to assess the areas of concern captured in the executive summary and revised in the second application submission. An additional executive summary will thereafter be generated and shared with the applicant. Feedback during the appeals process will be made in writing in advance of board action in the form of the executive summary. Such feedback is not intended to coach the applicant on the application details.

If the proposal is accepted, the charter school will fall under the district's insurance programs, unless otherwise stated in the charter contract.

Once a charter application has been approved, the District shall contract with the charter school based on the charter's unique mission and/or the student population that the charter serves as indicated in the charter's application.

REFERENCE: 70 O.S. §3-134

OSSBA Policy EGAAA-P

Adoption Date: October 3, 2005

Revision Date(s): 10/15/12, 7/1/16, 8/5/17, 10/16/

## Appendix A Curriculum Map (Sample)

### 1st Year Early Childhood - 3 year olds

	Practical Life	Sensorial	Language: Oral Language	Language: Writing	Language: Phonics & Reading	Mathematics	Geography and Cultural Studies	Music/Art
<b>August</b>	<u>Preliminary Exercises:</u> - Carrying a chair - Unrolling and rolling a floor mat - Walking around a mat  <u>Grace and Courtesy:</u> - Sitting in a group - Using Quiet Voice - Getting attention  <u>Control and Coordination of Movement:</u> - Walking on the line: Step 1 - Silence Game	<u>Visual:</u> - Color Tablets: Color Box 1  <u>Touch:</u> - Rough and Smooth Boards: 1  *After all sensorial experiences, introduce appropriate Sensorial Games and Language activities when the child is ready.	<u>Enrichment of vocabulary</u> - Objects in the environment - Listen and do games  <u>Modeled Language Experiences</u> - Nursery Rhymes - Poetry	See Language Resources Tab for phonetic sounds sequence possibilities.  - Sound Games: initial sounds		Assessment: - Rote Counting to 20 - Number recognition  <u>Numbers 1-10:</u> (review) - Number Rods and Cards - Spindle Boxes - Cards and Counters - Cards and Counters: Introduction to Odds and Evens	<u>Geography</u> - Observing the weather  <u>Biology</u> - Nature Walk	Known songs  Action songs  Movement Games  Drawing with colored pencils  Working with Clay



## 2nd Year Early Childhood - 4 year olds

	Practical Life	Sensorial	Language: Oral Language	Language: Writing	Language: Phonics & Reading	Mathematics	Geography and Cultural Studies	Music/Art
<b>August</b>	<u>Preliminary Exercises:</u> - review as necessary  <u>Grace and Courtesy:</u> - lessons given as needed  <u>Control and Coordination of Movement:</u> - Walking on the line - Silence Game	<u>Visual:</u> - Color Tablets: Color Box 2  <u>Auditory:</u> - Sound Cylinders: Pairing  *After all sensorial experiences, introduce appropriate Sensorial Games and Language activities when the child is ready.	<u>Enrichment of Vocabulary</u> - Listen and do games - Objects in the environment  <u>Modeled Language Experiences</u> - Nursery Rhymes - Poetry  <u>Guided Language Experience</u> - Sound Games	See Language Resources Tab for phonetic sounds and cursive writing sequence possibilities.  Assessment: - Name writing ability - Phonemic awareness and letter recognition - Metal Inset (one shape)	See Language Resources Tab for Puzzle Words and Phonogram Lists	Assessment: - Rote Counting to 20 - Number recognition  <u>Numbers 1-10:</u> (review) - Number Rods and Cards - Spindle Boxes - Cards and Counters - Cards and Counters: Introduction to Odds and Evens	<u>Geography</u> - Observing the weather  <u>Biology</u> - Nature Walk	Known songs  Action songs  Movement Games  Drawing with colored pencils  Working with Clay

### 3rd Year Early Childhood - 5 year olds

	Practical Life	Sensorial	Language: Oral Language	Language: Writing	Language: Phonics & Reading	Mathematics	Geography and Cultural Studies	Music/Art
<b>August</b>	<u>Grace and Courtesy:</u> - Getting attention - Sitting in group - Using Quiet Voice - Walking in Line - Building etiquette - Lunch etiquette  <u>Care of Self:</u> - review as necessary  <u>Care of the Environment:</u> - review as necessary	<u>Visual:</u> - Color Tablets: Color Box 3 - Knobless Cylinders  *After all sensorial experiences, introduce appropriate Sensorial Games and Language activities when the child is ready.	<u>Enrichment of Vocabulary</u> - Listen and do games - Objects in the environment  <u>Modeled Language Experiences</u> - Nursery Rhymes - Poetry  <u>Guided Language Experience</u> - Sound Games	See Language Resources Tab for phonetic sounds and cursive writing sequence possibilities.  <u>Assessment</u> - Phonemic Awareness - Letter Recognition  - Sound Games (syllables, blending, segmenting, substituting, etc.)	See Language Resources Tab for Puzzle Words and Phonogram Lists  <u>Phonemic Awareness</u> - Phonetic Reading Cards (review)	<u>Assessment:</u> <u>Numeral recognition and writing of numerals</u>  Review or Introduction of: - <u>Operations with the Golden Beads</u> - <u>Teens and Tens</u> - <u>Short (Square) and Long (Cube) chains</u> - <u>Stamp game</u> <u>Addition (static)</u>  Review or Introduction of: - <u>Introduction of the Clock</u>	<u>Geography</u> - <u>USA Map</u> - Continent tracing - Flags  <u>History</u> - Calendars: days of the week	Known songs  Action songs  Movement Games  Drawing with colored pencils Working with clay

## Appendix B Student Applications



## P3 Urban Montessori

Oklahoma City, Ok. 73111

### Application for Enrollment

**Directions:** Please print legibly or type.

\_\_\_\_\_  
First Name                      Middle                      Last Name

\_\_\_\_\_  
Known by

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
DOB (DD/MM/YY)                      Gender (M/F)

\_\_\_\_\_  
Resident Address                      City                      State                      Zip

\_\_\_\_\_  
Residence Telephone Number                      Cell Phone Number

\_\_\_\_\_  
Previous School (if applicable)

#### Guardian #1 Details

Name \_\_\_\_\_ Relationship \_\_\_\_\_

Mobile Number \_\_\_\_\_ Email address \_\_\_\_\_

*Guardian #2 Details*

Name \_\_\_\_\_ Relationship \_\_\_\_\_

Mobile Number \_\_\_\_\_ Email address \_\_\_\_\_

Allergies: \_\_\_\_\_

Special Dietary needs: \_\_\_\_\_

**Declaration**

*I confirm that the information on this form is correct, and I have read the admissions arrangements and understand how students are accepted and places are allocated. Upon request, I agree to provide the School Admissions Service with information regarding my child's address as part of their verification process. (See pupil Details in the booklet)*

\_\_\_\_\_  
Signature of Parent/Legal Guardian#1

\_\_\_\_\_  
Signature of Parent/Legal Guardian#2

\_\_\_\_\_ INITIALS: *I understand that 3P Urban Montessori does not provide transportation services to/and from school. I further understand it is the responsibility of the Parent/Guardian to offer and arrange for transportation for my child to/and from school each day in order to comply with state compulsory attendance law (as explained in my Student Handbook).*

**Office Use:**

- ☐ Recent photo of the child
- ☐ Photo Identification of Guardian #1
- ☐ Photo Identification of Guardian #2
- ☐ Proof of Address
- ☐ Birth Certificate
- ☐ Vaccine Requirements
- ☐ Student Handbook Provided (to Guardian)
- ☐ Orientation and School Handbook overview (with student & Guardian)
- ☐ School Tour
- ☐ Consent to Release Information (Form XX)
- ☐ School Choice Information
- ☐



## *P3 Urban Montessori*

Oklahoma City, Ok. 73111

### Application for Enrollment

**Directions:** Please print legibly or type.

\_\_\_\_\_  
Nombre                      Medio                      Apellido

\_\_\_\_\_  
Conocido por

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
DOB (DD/MM/YY)                      Género (M/F)                      \_\_\_\_\_

\_\_\_\_\_  
Dirección del residente                      Ciudad                      Estado      Código  
postal

\_\_\_\_\_  
Residencial Número de teléfono                      Número de teléfono celular

\_\_\_\_\_  
Escuela anterior (si corresponde)

#### *Guardian #1 Detalles*

Nombre \_\_\_\_\_ Relación \_\_\_\_\_

Número de teléfono celular \_\_\_\_\_

Dirección de correo electrónico \_\_\_\_\_

*Guardian #2 Detalles*

*Nombre* \_\_\_\_\_ *Relación* \_\_\_\_\_

*Número de teléfono celular* \_\_\_\_\_

*Dirección de correo electrónico* \_\_\_\_\_

*Alergias:* \_\_\_\_\_

*Necesidades dietéticas especiales:* \_\_\_\_\_

*Declaración*

*Confirmo que la información en este formulario es correcta, y he leído los arreglos de admisión y entiendo cómo se aceptan los estudiantes y se asignan las plazas.*

*Prevía solicitud, acepto proporcionar al Servicio de Admisiones Escolares información sobre la dirección de mi hijo como parte de su proceso de verificación. (Ver detalles del alumno en el folleto)*

\_\_\_\_\_  
*firma del padre/tutor legal#1*

\_\_\_\_\_  
*Firma del padre/tutor legal#2*

\_\_\_\_\_  
*INICIALES: Entiendo que 3P Urban Montessori no proporciona servicios de transporte hacia / y desde la escuela. Además, entiendo que es responsabilidad del padre / tutor ofrecer y organizar el transporte para mi hijo hacia / y desde la escuela todos los días para cumplir con la ley estatal de asistencia obligatoria (como se explica en mi Manual del estudiante).*

*Office Use:*

- ☐ *Recent photo of the child*
- ☐ *Photo Identification of Guardian #1*
- ☐ *Photo Identification of Guardian #2*
- ☐ *Proof of Address*
- ☐ *Birth Certificate*
- ☐ *Vaccine Requirements*
- ☐ *Student Handbook Provided (to Guardian)*
- ☐ *Orientation and School Handbook overview (with student & Guardian)*
- ☐ *School Tour*
- ☐ *Consent to Release Information (Form XX)*
- ☐ *School Choice Information*
- ☐

## **Appendix C Board Treasurer Job Description**



## **Legacy Learning Board Treasurer Job Description**

### **School Background**

P3 Urban Montessori is the first early childhood public Montessori to be established in Oklahoma City servicing children from the ages of three to five in the Northeast Oklahoma City area. Our Mission is P3 Urban Montessori seeks to provide a culturally responsive Montessori early childhood education to children in Northeast OKC that fosters autonomous, competent, responsible, adaptive citizens who are lifelong learners, problem solvers committed to uplifting their community.

### **Role Summary and Information**

#### **A. Financial oversight and management:**

- Maintain accurate and up-to-date records of the school's donated and outside funds.
- Prepare and present financial reports to the Board, School Lead, and other stakeholders.
- Monitor the board's budget and expenditures—also adhere to Fiscal policies.

#### **B. Budget Planning and Monitoring:**

- Collaborate with school administrators to develop and implement the annual budget.
- Monitor budget performance, identifying discrepancies and recommending adjustments as needed.
- Provide financial insights to support strategic decision-making by the Board.

**C. Financial Compliance**

- Ensure compliance with local, state, and federal financial regulations and reporting requirements.
- Oversee audits and work with auditors to address findings or recommendations.

**D. Investment and Cash Management:**

- Manage the school district's investments ensuring responsible use of funds.
- Implement effective cash management strategies to optimize the school's financial resources.

**E. Attention to Details**

- Discerning attention to detail in financial record-keeping, reporting, and compliance.
- Accuracy in financial data analysis and budget tracking.

**F. Ethics and Integrity:**

- Ability to maintain confidentiality and handle sensitive financial information.

## **Appendix D** Articles of Inc. and Board Bylaws

**Statement and Resignation by Written Consent of the Incorporator of  
Legacy Learning Inc.**

The undersigned, being the sole incorporator of Legacy Learning Inc. (the "Corporation"), a corporation filed in the state of OK, adopts the following resolutions by written consent without a meeting, which shall be effective immediately upon the existence of the Corporation.

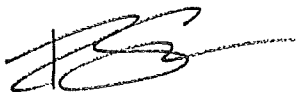
RESOLVED, that each person named below is appointed to serve as initial director of the Corporation until the first meeting of the shareholders or until his/her successors are elected and qualified to serve:

- 1      Cecilia Woods
- 2      ROSALYN ROBINSON

RESOLVED, that this Written Consent shall be filed in the Corporation's minute book by the initial directors.

RESOLVED, that the undersigned resigns as incorporator of the Corporation and relinquishes any and all control of, authority over, or involvement with the Corporation—real or perceived—to the initial director/s of the Corporation, effective immediately upon the existence of the Corporation.

Signed and executed by the incorporator on 5/23/2023.



---

Frances Severe, Incorporator

OFFICE OF THE SECRETARY OF STATE



**NOT FOR PROFIT  
CERTIFICATE OF INCORPORATION**

*WHEREAS, the Not For Profit Certificate of Incorporation of*

**LEGACY LEARNING INC.**

*has been filed in the office of the Secretary of State as provided by the laws of the State of Oklahoma.*

*NOW THEREFORE, I, the undersigned, Secretary of State of the State of Oklahoma, by virtue of the powers vested in me by law, do hereby issue this certificate evidencing such filing.*

*IN TESTIMONY WHEREOF, I hereunto set my hand and cause to be affixed the Great Seal of the State of Oklahoma.*



*Filed in the city of Oklahoma City this  
23rd day of May, 2023.*

*Brian T. Longman*

*Secretary of State*

## OKLAHOMA Secretary of State Electronic Filing

<b>CERTIFICATE OF INCORPORATION</b> <b>DOMESTIC NOT FOR PROFIT CORPORATION</b> Document Number: 60059290002    Submit Date: 5/23/2023	
<b>CORPORATION NAME</b>	
The name of the corporation is: LEGACY LEARNING INC.	
<b>PURPOSE</b>	
Charter School  This corporation does not have authority to issue capital stock.  This corporation is not for profit, and as such the corporation does not afford pecuniary gain, incidentally or otherwise, to its members.	
<b>EFFECTIVE DATE</b>	
Effective Date: Same as filing date.	
<b>DURATION</b>	
Perpetual	
<b>REGISTERED AGENT AND REGISTERED OFFICE ADDRESS</b>	
Agent Name ROCKET LAWYER CORPORATE SERVICES LLC Address 1833 SOUTH MORGAN RD OKLAHOMA CITY, OK 73128 USA	
<b>INCORPORATOR INFORMATION</b>	
Name CECILIA WOODS Address 8820 N EASTERN AVE OKLAHOMA CITY, OK 73131 USA	Title Incorporator
Name ROSALYN ROBINSON Address 209 NW 81ST ST OKLAHOMA CITY, OK 73114 USA	Title Incorporator
Name GARY WOODS Address 8820 N EASTERN AVE OKLAHOMA CITY, OK 73131 USA	Title Incorporator
<b>DIRECTOR INFORMATION</b>	
Name CECILIA WOODS	Title Director

**Address**  
8820 N EASTERN AVE  
OKLAHOMA CITY, OK 73131 USA

**Name**  
ROSALYN ROBINSON

**Title**  
Director

**Address**  
209 NW 81ST ST  
OKLAHOMA CITY, OK 73114 USA

**Name**  
GARY WOODS

**Title**  
Director

**Address**  
8820 N EASTERN AVE  
OKLAHOMA CITY, OK 73131 USA

The Number of Directors to be Elected at the First Meeting: 3

#### ATTACHMENTS

**File Label**  
501c3

**File Name and Path**  
6522704-1.pdf

#### SIGNATURE

I hereby certify that the information provided on this form is true and correct to the best of my knowledge and by attaching the signature I agree and understand that the typed electronic signature shall have the same legal effect as an original signature and is being accepted as my original signature pursuant to the Oklahoma Uniform Electronic Transactions Act, Title 12A Okla. Statutes Section 15-101, et seq.

Dated - 5/23/2023

**Corporation Name**

**Signature Name**  
CECILIA WOODS  
ROSALYN ROBINSON  
GARY WOODS

**Title**

[End Of Image]

**Power of the corporation:**

No part of the net earnings of the Corporation shall inure to the benefit of, or be distributable to its members, trustees, officers, or other private persons, except that the Corporation shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes set forth in the purpose clause. No substantial part of the activities of the Corporation shall be the carrying on of propaganda or otherwise attempting to influence legislation and the Corporation shall not participate in, or intervene in (including the publishing or distribution of statements) any political campaign on behalf of or in opposition to any candidate for public office. Notwithstanding any other provision of these articles, the Corporation shall not carry on any other activities not permitted to be carried on (a) by a Corporation exempt from federal income tax under section 501(c)(3) of the Internal Revenue Code, or the corresponding section of any future federal tax code, or (b) by a Corporation, contributions to which are deductible under section 170(c)(2) of the Internal Revenue Code, or the corresponding section of any future federal tax code.

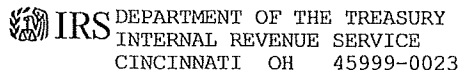
**The purpose for which this corporation is organized**

Said Corporation is organized exclusively for charitable, religious, educational, and scientific purposes, including, for such purposes, the making of distributions to organizations that qualify as exempt organizations under section 501(c)(3) of the Internal Revenue Code, or the corresponding section of any future federal tax code.

**Distribution of assets on dissolution**

Upon the dissolution of the Corporation, assets shall be distributed for one or more exempt purposes within the meaning of section 501(c)(3) of the Internal Revenue Code, or the corresponding section of any future federal tax code, or shall be distributed to the federal government, or to a state or local government, for a public purpose. Any such assets not so disposed of shall be disposed of by a Court of Competent Jurisdiction of the county in which the principal office of the Corporation is then located, exclusively for such purposes or to such organization or organizations, as said Court shall determine, which are organized and operated exclusively for such purposes.





Date of this notice: 05-17-2023

Employer Identification Number:  
93-1401927

Form: SS-4

Number of this notice: CP 575 E

LEGACY LEARNING  
% LEGACY LEARNING  
8820 N EASTERN AVE  
OKLAHOMA CITY, OK 73131

For assistance you may call us at:  
1-800-829-4933

IF YOU WRITE, ATTACH THE  
STUB AT THE END OF THIS NOTICE.

#### WE ASSIGNED YOU AN EMPLOYER IDENTIFICATION NUMBER

Thank you for applying for an Employer Identification Number (EIN). We assigned you EIN 93-1401927. This EIN will identify your entity, accounts, tax returns, tax returns, and documents, even if you have no employees. Please keep this notice in your permanent records.

Taxpayers request an EIN for business and tax purposes. Some taxpayers receive CP575 notices when another person has stolen their identity and are operating using their information. If you did **not** apply for this EIN, please contact us at the phone number or address listed on the top of this notice.

When filing tax documents, making payments, or replying to any related correspondence, it is very important that you use your EIN and complete name and address exactly as shown above. Any variation may cause a delay in processing, result in incorrect information in your account, or even cause you to be assigned more than one EIN. If the information is not correct as shown above, please make the correction using the attached tear-off stub and return it to us.

When you submitted your application for an EIN, you checked the box indicating you are a non-profit organization. Assigning an EIN does not grant tax-exempt status to non-profit organizations. Publication 557, Tax-Exempt Status for Your organization, has details on the application process, as well as information on returns you may need to file. To apply for recognition of tax-exempt status, organizations must complete an application on one of the following forms: Form 1023, Application for Recognition of Exemption Under Section 501(c)(3) of the Internal Revenue Code; Form 1023-EZ, Streamlined Application for Recognition of Exemption Under Section 501(c)(3) of the Internal Revenue Code; Form 1024, Application for Recognition Under Section 501(a); or Form 1024-A, Application for Recognition of Exemption Under Section 501(c)(4) of the Internal Revenue Code.

Nearly all organizations claiming tax-exempt status must file a Form 990-series annual information return (Form 990, 990-EZ, or 990-PF) or notice (Form 990-N) beginning with the year they legally form, even if they have not yet applied for or received recognition of tax-exempt status.

If you become tax-exempt, you will lose tax-exempt status if you fail to file a required return or notice for three consecutive years, unless a filing exception applies to you (search [www.irs.gov](http://www.irs.gov) for Annual Exempt Organization Return: Who Must File). We start calculating this three-year period from the tax year we assigned the EIN to you. If that first tax year isn't a full twelve months, you're still responsible for submitting a return for that year. If you didn't legally form in the same tax year in which you obtained your EIN, contact us at the phone number or address listed at the top of this letter. For the most current information on your filing requirements and other important information, visit [www.irs.gov/charities](http://www.irs.gov/charities).

LEGACY LEARNING  
% LEGACY LEARNING  
8820 N EASTERN AVE  
OKLAHOMA CITY, OK 73131

**BY-LAWS OF**  
**LEGACY LEARNING FOUNDATION**

**ARTICLE I**

**GENERAL PROVISIONS**

**Section 1. NAME**

The legal name of the Corporation shall be known as Legacy Learning Foundation, hereinafter referred to as the Foundation.

**Section 2. MISSION**

Legacy Learning Foundation seeks to provide a culturally responsive Montessori early childhood education to children in Northeast OKC that fosters autonomous, competent, responsible, adaptive citizens who are lifelong learners and problem solvers committed to uplifting their community.

**Section 3. PURPOSE**

This Foundation is established for the purpose of accepting and disbursing contributions, gifts, and bequests from individuals, groups, and public/private businesses to supplement, support, and enrich current and future educational programs, activities, and learning opportunities inside and outside the classroom for P3 Urban Montessori students, teachers, and staff; and the education of the public on issues/initiatives pertaining to P3 Urban Montessori. All activities and transactions of the Foundation shall comply with Internal Revenue Service (IRS) Publication 557, Section 501(c)(3) of the Internal Revenue Code of 1986 or the corresponding provisions of any future federal tax code.

**Section 4. LOCATIONS**

The principal place of business of the Foundation shall be 309 NW 13<sup>th</sup> Suite 103., Oklahoma City, OK. 73103. The Foundation may have other offices, as deemed necessary by the Board of Directors.

**Section 5. FISCAL YEAR.**

The fiscal year of the Foundation shall be July 1st to June 30.

## **Section 6. REGISTERED OFFICE AND REGISTERED AGENT**

The registered agent for the Foundation shall be Rocket Lawyer.

## **ARTICLE II**

### **BOARD OF DIRECTORS**

**Section 1. GENERAL POWERS AND RESPONSIBILITIES.** The Foundation shall be governed by a Board of Directors (the "Board"). Directors shall perform all duties in the best interest of the Foundation. The Board shall establish or approve policies and directives governing the business and programs of the Foundation and shall delegate to P3's head of School the authority and responsibility to ensure that the policies and directives are appropriately followed. The Board shall have the power to enter into any and all contracts necessary to carry out the purpose of the Foundation.

**Section 2. NUMBER** The number of Directors shall not be less than seven (7) nor more than eleven (11). The number of Board members may be increased beyond eleven (11) by the affirmative vote of a majority of the then-serving Board of Directors.

In addition to the number of Directors set forth above, the following individuals shall serve on the Foundation's Board of Directors as non-voting, ex-officio members: P3 School Lead and a senior level employee of P3 Urban Montessori (the Business Manager), who shall serve as staff support of the Foundation. The Board, in its discretion, may appoint additional ex-officio members. Ex-officio members shall support the Foundation by serving on committees, participating in meetings, etc.

**Section 3. TERM OF OFFICE.** Each voting Director of the Board shall serve a term of three (3) years. No person shall serve more than three (3) consecutive terms (9 years), unless an extended term is approved by a majority of the Board present at the meeting. If an extension is approved, a member of the Board may serve a maximum of two (2) additional consecutive terms (6 years). Despite the expiration of a director's term, he/she will continue to serve (if willing) until he/she is reappointed, or a new Director is appointed to fill the vacancy. After serving the maximum number of consecutive years on the Board (including an approved extension), a former Director may be eligible for Board membership again, after three (3) years have passed since he/she completed his/her term.

**Section 4. BOARD ELECTIONS.** Recommendations for Board membership shall be made to the Membership Committee. The Membership Committee shall present nominations (in writing) for new and renewing Board members to the Board of Directors at the Foundation's July meeting. If a Membership Committee doesn't exist, any member of the Board may present a written nomination for Board membership at the July meeting. New and renewing Board members shall be approved by a majority of the Board of Directors present at the annual meeting.

**Section 5. QUALIFICATIONS** Residency within the State of Oklahoma is not required to serve as a Director. Persons serving on the Board shall possess basic qualities such as integrity, a sense of justice, and a sound moral compass. Directors will function in a fiduciary capacity with a full understanding of the attendant responsibilities including maintaining the necessary level of confidentiality.

**Section 6. RIGHTS AND RESPONSIBILITIES** The Board of Directors holds the charter for 3P Urban Montessori, pursuant to the Oklahoma State Charter School Act. The Board of Directors is an organized group of volunteers who collectively are legally and ethically responsible to the community and the state for the health, vitality, and effectiveness of the organization. The primary role of the Board is "governance." Governance encompasses legal responsibilities, general and academic oversight, planning and policy-making, and meeting fiduciary requirements.

**Section 7. RESIGNATION** Any Director may resign by providing written notice to the Board Chair of the Foundation. The resignation shall be effective on its receipt unless a future effective date is set forth in the notice of resignation.

**Section 8. REMOVAL OF DIRECTOR** A Director may be removed with or without cause when deemed in the best interest of the Foundation. Removal shall require an affirmative vote of two-thirds of the Directors then in office. The notice of the meeting shall state that the purpose of the meeting is to vote on the removal of Directors named in the notice.

**Section 9. BOARD VACANCY.** Any vacancy occurring due to the resignation, death, removal, or other reason, except the expiration of a Director's term, shall be filled by appointment by a majority vote of the Directors present at a regular or special meeting. The appointed Director shall serve the unexpired term of the Director causing the vacancy to exist and shall continue to serve until reappointed or a successor is elected. All appointments made under this section shall comply with Section 5, Term of Office.

## **ARTICLE III**

### **MEETINGS**

**Section 1. OPEN MEETING LAW** The School is subject to and shall therefore comply with the provisions of both the Oklahoma Open Meeting Act, 25 Okla. Stat. Ch. 8, §§303, et seq., and the Oklahoma Open Records Act, 51 Okla. Stat. §§24A.1, et seq. Under the Oklahoma Open Meeting Act, 25 Okla. Stat. §311, public notice must be given, in writing, by December 15 of each calendar year of the schedule showing the date, time, and place of the regularly scheduled meetings for the following calendar year.

**Section 2. ANNUAL MEETING** The regular meeting held in July shall be the annual meeting of the Foundation.

**Section 3. REGULAR MEETINGS.** The Board of Directors shall meet at least one time per month and/or at other times during the year to conduct the business of the Foundation. Meetings shall be held at the Foundation's principal place of business unless otherwise stated in the notice. The Board of Directors may permit any or all Directors to participate in a regular meeting by, or conduct the meeting through the use of, any means of communication by which all Directors participating may simultaneously hear and communicate with each other, read or see documents presented, pose questions, and make comments. A Director participating in a meeting by this means shall be deemed to be present in person.

**Section 4. SPECIAL MEETINGS.** Special meetings may be requested by the Board Chair or the Board of Directors. Meetings shall be held at the Foundation's principal place of business unless otherwise stated in the notice. The Board of Directors may permit any or all Directors to participate in a special meeting by, or conduct the meeting through the use of, any means of communication by which all Directors participating may simultaneously hear and communicate with each other, read or see documents presented, pose questions, and make comments. A Director participating in a meeting by this means shall be deemed to be present in person.

**Section 4. CLOSED MEETINGS.** Closed sessions shall be held regarding personnel matters or other matters requiring confidentiality as approved by the Open Meetings Act. No action may be taken in a closed session and an officer shall provide a general description of the matters discussed in the closed session to be provided for the minutes thereof.

**Section 5. NOTICE OF MEETINGS.** Written notice of all meetings shall include the place, day, and time of the meeting, and in the case of a special meeting, the purpose for which the meeting is called. Notice of regular meetings shall be delivered

to each Director not less than five (5) business days prior to the date of the meeting. Notice of special meetings shall be delivered to each Director in accordance with the provisions of Section 9 above. Notice shall either be delivered personally, mailed, or transmitted electronically to each Director at his/her last known address/email on file with the School Lead of 3P Urban Montessori and the Secretary of the Board.

**Section 6. QUORUM AND VOTING.** A majority of the Board of Directors then in office shall constitute a quorum for the transaction of business. All action of the Board of Directors, except as otherwise provided in these Bylaws, shall require a majority vote of the Directors present at any meeting.

Each Director shall have only one (1) vote. The vote of a majority of the Directors present at a properly called meeting at which a quorum is present shall be the act of the Board of Directors unless the vote of a greater number is required by law or these Bylaws. Voting by written proxy is not allowed. The Board shall keep written minutes of its proceedings, including action taken informally, in its permanent records.

**Section 7. RECUSAL** In the case of an apparent conflict of interest arises where a Director is involved in a particular matter involving specific outside parties (including individuals, corporate entities, etc) and the circumstances are such that a reasonable person with knowledge of the relevant facts would question the Director's impartiality in the matter. Such circumstances include the involvement of a relative, spousal employer, or former employer in the matter. In this case, the Director would need to recuse themselves thus disqualifying that party from participation in the particular matter.

**Section 8. RULES OF ORDER** In case of conflict or challenge, the rules of order in the current edition of Robert's Rules of Order shall govern the conduct of all meetings.

**Section 9. BOARD MEMBER ATTENDANCE.** All Directors are expected to attend meetings of the Foundation. A Director who is absent from two (2) consecutive regular meetings of the Board, absent extenuating circumstances, shall be encouraged by the Board Chair to reevaluate his/her commitment to the Foundation. The Board may deem a Director who has missed three (3) consecutive meetings, absent extenuating circumstances, to have resigned from the Board.

**Section 10. MINUTES OF BOARD MEETINGS.** The Secretary shall be responsible for the recording of all minutes of each and every meeting of the Board in which business shall be transacted. The Secretary shall prepare the minutes of the meeting and provide a copy to each Director, the School Lead, and staff to the Board via regular mail, in person, email, or other electronic means, within seven (7) days after each Board meeting.

**Section 11. INFORMAL ACTION/ACTION BY WRITTEN CONSENT.** Any action required or permitted to be taken at any meeting of the Board of Directors, or any action which may be taken at a committee of Directors, including a vote on the expenditure of Foundation funds, may be taken without a meeting. Any vote by the Board of Directors that occurs outside of a meeting must be conducted in such a manner that all Directors are able to cast a vote and see the votes cast. Any action by written consent requiring the expenditure of Foundation funds requires an affirmative vote of two-thirds of the Directors then in office. Such action must be reflected in the official minutes.

## **ARTICLE IV**

### **COMPENSATION AND PERSONAL LIABILITY**

**Section 1. COMPENSATION** Members of the Board of Directors shall receive no compensation for their service on the Board, other than reimbursement for reasonable and authorized expenses related to their Board service. However, nothing in these Bylaws shall be construed to preclude any Board member from serving the Foundation in any other capacity (i.e., a contractor for services) and receiving compensation for services rendered.

**Section 2. NO PERSONAL LIABILITY** The Foundation makes no warranties of any kind, whether express or implied, for the services provided and will not be responsible for any damages which you may suffer through the use of the school system or the Internet, including, but not limited to, the loss of information or files or the interruption of service. The District is not responsible for the accuracy or quality of information obtained through the use of the school system or the Internet. The Foundation is not responsible for any financial obligations that may be incurred through use of the Foundation's system.

## **ARTICLE V**

### **OFFICERS**

**Section 1. NUMBER.** All Officers of the Foundation shall be voting members of the Board of Directors. The four (4) Officers shall include a Board Chair, Vice-Chair, Treasurer, Secretary, and any other officers as may be approved by the Board of Directors. Directors who are related by blood or marriage are not eligible to simultaneously serve in the office of Board Chair and Treasurer, or Vice-Chair and Treasurer.



**Section 2. ELECTION AND TERM OF OFFICERS.** The Officers of the Foundation shall be elected annually, at the July meeting of the Board of Directors. If the election of Officers is not held at the July meeting, such election shall be held as soon as practicable thereafter. Each Officer shall retain his/her office until reelected or a successor is elected. No person may hold the same office consecutively for more than six (6) one-year terms.

**Section 3. RESIGNATION, REMOVAL AND VACANCY.** Any Director may resign by providing written notice to the Board Chair of the Foundation. The resignation shall be effective on its receipt unless a future effective date is set forth in the notice of resignation.

Any Officer elected or appointed by the Board of Directors may be removed by the Board of Directors when it's deemed to be in the best interest of the Foundation. Removal of an Officer shall require an affirmative vote of two-thirds of the Directors then in office. The notice of the meeting shall state that the purpose of the meeting is to vote on the removal of one or more Officers named in the notice.

Vacancies or new offices may be filled at any meeting of the Board of Directors. A vacancy that results due to death, resignation, removal or otherwise, shall be filled by the Board of Directors at the next regular meeting or a special meeting.

**Section 5. BOARD CHAIR.** The Chair is the chief elected Officer of the Foundation and shall: (a) have general charge of the business, affairs, and assets of the Foundation, subject to the direction, supervision, and consent of the Board of Directors; (b) preside at all meetings of the Board of Directors and shall ensure that all orders and resolutions of the Board are carried out; (c) shall be empowered to represent the Foundation between meetings of the Board and shall keep the Directors completely informed of all activities of the Foundation; (d) shall, in general, perform all duties and have all powers incidental to the Office of Board Chair, as may be authorized by these Bylaws or the Board of Directors.

**Section 6. THE VICE CHAIR.** At the request of the Board Chair or in the event of the absence or disability of the Chair, the Vice Chair shall perform all duties of the Chair, and when so acting, shall have all the powers of, and shall be subject to all of the restrictions upon the Chair. The Vice-Chair shall perform such other duties and have such other powers as from time to time may be assigned by these Bylaws, the Board of Directors, or the Chair.

**Section 7. THE SECRETARY.** The Secretary shall: (a) keep minutes of all meetings of the Board of Directors; (b) ensure that all notices are given in accordance with the provisions of these Bylaws, Board directives, and as required by law; (c) be custodian of the Foundation's records; (d) certify the Bylaws, resolutions,

and other documents of the Foundation as true and correct copies thereof; (e) maintain custody of the seal of the Foundation and cause such seal to be affixed to, or impressed upon, all documents authorized and executed by the Foundation; (f) keep current records of the name, mailing address and telephone numbers of all Board of Directors of the Foundation; and (g) perform other duties incidental to the office of Secretary and such duties as may be assigned by the Board of Directors.

**Section 8. THE TREASURER.** The Treasurer provides general financial oversight, and shall: (a) have responsibility for all Foundation funds and securities and keep and maintain complete and accurate ledgers and records of all business transactions of the Foundations, including funds received, deposited, and disbursed, and funds due and payable to the Foundation; (b) cause all monies and other valuable effects to be deposited in the name and to the credit of the Foundation in such banks, trust companies, or other depositories as may be designated by the Board of Directors; (c) cause the funds of the Foundation to be disbursed when duly authorized by the Board of Directors; (d) oversee and monitor budgets, accounts and financial statements; (e) provide regular (at least quarterly financial reports of all transactions, account balances, and financial condition of the Foundation to the Chair and Board of Directors; (f) provide each Director with an annual financial audit report; (g) serve as an authorized signatory for Foundation account(s), as approved by the Board of Directors; (h) safe-guard Foundation funds by ensuring that appropriate financial systems and controls are in place; (i) perform other duties incidental to the office of Treasurer and/or as assigned by the Board of Directors.

The Board of Directors may authorize another voting Director to serve as a signatory on checks and financial accounts or serve temporarily as Treasurer, in the event the Treasurer is unavailable or unable to perform the duties of the Office.

**Section 9. OTHER OFFICERS.** The Board of Directors may add and appoint other Officers as it deems necessary.

## **ARTICLE VI**

### **COMMITTEES**

**Section 1. COMMITTEES** The Board of Directors shall establish such committees as it deems necessary to carry out the purposes and functions of the Foundation. The number of persons on each committee shall be determined by the Board Chair or Board of Directors and shall be composed of at least two (2) members of the Board of Directors. Each committee may include people who are not members of the Board of Directors nor affiliated with 3P Urban Montessori. Each committee shall report quarterly on all activities.

**Section 2. GOVERNANCE COMMITTEE** There shall be an Executive Committee consisting of the Board Chair, the Vice Chair, the Secretary and the Treasurer. The Executive Director, if a person has been so designated, shall serve as an ex-officio member of the Executive Committee. Other Directors may be appointed to the Executive Committee if deemed necessary by the Board Chair or Board of Directors. The Board Chair shall serve as chairperson of the Executive Committee .

**Section 3. POWERS.** The Executive Committee shall be entitled to exercise all of the authority and powers of the Board of Directors, subject to the direction and control of the Board, and shall ensure that all actions are in the best interest of the Foundation. The Executive Committee shall oversee the activities of all Standing Committee of the Foundation, supervise the activities of the Executive Director in the performance of assigned duties, and establish or recommend personnel, compensation, and other Foundation policies.

**Section 4. MEETINGS OF EXECUTIVE COMMITTEE.** The Executive Committee shall meet at least monthly and shall hold meetings at such times and places as shall be specified by the Chairperson. Special meetings of the Executive Committee may be called at any time by the chairperson or by any three (3) members of the Executive Committee at such times and places and upon such notice as shall be deemed advisable by the person or persons calling such meeting, provided that such notice is received at least twenty-four (24) hours in advance of such meeting.

**Section 5. QUORUM.** A majority of the members thereof shall constitute a quorum at any meeting of the Executive Committee; provided a quorum may be achieved through a telephone conference in which the necessary number thereof participate. The vote of a majority of the members of the Executive Committee shall be necessary for any action taken by the Executive Committee. Notwithstanding any requirement to the contrary, the Executive Committee may act upon a written memorandum of action, duly subscribed by all members of the Executive Committee.

**Section 6. RECORD KEEPING.** Written minutes of all meetings of the Executive Committee or, as the case may be, written memoranda of all actions taken by the Executive Committee, shall be kept and maintained as part of the official records of the Foundation.

## **ARTICLE VII**

### **STAFF**

**Section 1. CHIEF EXECUTIVE OFFICER** The Founders of 3P Urban Montessori shall designate a senior-level staff member to serve as the Executive Director of the Foundation. The Executive Director shall conduct and be responsible for the daily operation and management of the Foundation. The Executive Director shall attend all meetings of the Board of Directors and Executive Committee; provided that the Executive Director may be excluded when an executive session is called for the purpose of discussing personnel matters affecting or involving the Executive Director. The Executive Director shall be an ex-officio, non-voting member of all committees and subcommittees of the Foundation. The Executive Director's duties shall include, but not be limited to:

- a) Formulating and recommending policies to the Executive Committee and the Board of Directors.
- b) Providing professional leadership for the evaluation, development, and implementation of all programs and policies of the Foundation.
- c) Principal responsibility for the engagement, supervision, and termination of all other employees of the Foundation, provided that no person shall be employed unless approved in advance by the Board of Directors or Executive Committee.
- d) Principal responsibility for the management and administration of the Foundation's day-to-day operations and activities.
- e) Keeping the Board of Directors and the Executive Committee informed as to all material matters and developments affecting the business and affairs of the Foundation.
- f) Scheduling and coordinating the meetings of the Executive Committee and the Board of Directors, including preparing/presenting documents, reports, and other materials pertaining to the activities, business, and affairs of the Foundation.
- g) Coordinating meetings of committees and subcommittees and preparing/presenting documents, reports, and other materials when requested by a committee chair.
- h) Performing other duties that may be assigned by the Board Chair of the Foundation or Executive Committee.

## **ARTICLE VIII**

### **MISCELLANEOUS**

**Section 1. CHECKS, NOTES, CONTRACTS** All checks, drafts, orders for payment of money, notes or other evidence of indebtedness, transfers of funds, notes, acceptance of written securities, and any other financial transactions authorized or approved by the Board of Directors shall be signed by the Board Chair or Vice-Chair and Treasurer. All funds received on behalf of the Foundation shall be properly recorded and deposited into such banks, trust companies, investment companies, or other financial institutions approved and authorized by the Board of Directors.

**Section 2. BOOKS AND RECORDS** The Foundation shall keep correct and complete books and records of account and shall also keep records of the actions and in the minutes of the proceedings of the Board. The books and records of the account, and the minutes of the proceeding of the Board at any reasonable time and for the purpose responsibly related may be inspected by an officer, agent or attorney of the Sole Member and the right to make such inspections shall include the right to make extracts or copies.

**Section 3. ANNUAL REPORT** The accounts of the Foundation shall be audited annually, after the close of the fiscal year, by an internal audit committee and/or an independent certified public accountant (auditor) approved by the Board of Directors. Copies of each annual audit shall be filed with the Clerk of the Board of Education of the 3P Urban Montessori. The annual audit shall also be provided to each member of the Board of Directors and made available for public inspection.

**Section 4. RIGHT OF INSPECTION** An internal audit committee and/or an independent certified public accountant (auditor) approved by the Board of Directors shall have the right to inspect financial records, documents, and transactions related to the school district's finances. This provision is often included to ensure transparency, accountability, and compliance with legal and regulatory requirements.

**Section 5. AMENDMENTS** These Bylaws may be altered, amended, or repealed, by an affirmative vote of a two-thirds majority of all Directors then serving on the Board of Directors at the annual or a special meeting, provided that notice of the intent to amend or repeal these Bylaws, along with the text of the proposed changes, is provided to all Directors at least ten (10) business days prior to the meeting.

**Section 6. INDEMNIFICATION** Every Director and Officer of the Foundation shall be indemnified and held harmless by the Foundation, to the fullest extent authorized by the law as it now exists or may subsequently be amended by, against all costs and expenses (including attorney fees) actually and necessarily incurred by or imposed upon such Director or Officer in connection with or resulting from any action, suit, or proceeding of whatever nature to which such Director or Officer is or

shall be made a party by reason of Director or Officer being or having been a Director or Officer of the Foundation (whether or not he/she is a Director or Officer of the Foundation at the time he/she is made a party to such action, suit, or proceeding, or at the time such costs or expenses are incurred by or imposed upon him/her), except in relation to matters as to which such Director or Officer shall be adjudged in such action, suit, or proceeding to be liable for gross negligence or misconduct in the performance of such Director's or Officer's duties as such Director or Trustee, provided, however, that in the case of an action, suit, or proceeding which is settled or compromised, such right of indemnification shall be applicable only (a) if such settlement or compromise is approved by the Court having jurisdiction of such action, suit, or proceeding, and (b) to the extent provided in the terms of such compromise or settlement so approved. Every such person shall be entitled, without demand by such person upon the Foundation or any action by the Foundation, to enforce the right to such indemnity in an action at law against the Foundation.

**Section 7. ADVANCES AND REPAYMENTS** No advances or loans shall be contracted on behalf of the Foundation and no note or other evidence of indebtedness shall be issued in its name unless and except as the specific transaction is authorized by the Board Chair, and is allowed by applicable law. Without the express and specific authorization of the Board of Directors, no officer or other agent of the Foundation may enter into any contract or execute and deliver any instrument in the name of and on behalf of the Foundation.

**Section 8. AUTHORIZATION** All documents, instruments or writings of any nature that have been authorized or approved by the Board of Directors shall be signed by the Board Chair and shall be acknowledged and verified by the Secretary of the Foundation.

**Section 9. INSURANCE** The Board of Directors shall purchase liability insurance coverage for each and every Director and Officer of the Foundation. The liability insurance shall be in such amounts as the Board of Directors deems reasonable and appropriate for the position and function of the individual being insured. It is the purpose of this section to ensure Directors, Officers, and employees from pecuniary loss for carrying out their duties and responsibilities of the Foundation. The D&O insurance coverage for the Director serving as Treasurer shall be purchased in addition to the bond referenced in Section 11.

**Section 10. DISSOLUTION** The assets of the Foundation are irrevocably dedicated to and for non-profit purposes only. No part of the assets of the Foundation, on dissolution or otherwise, shall inure to the benefit of any person or any Director or Officer of the Foundation. On liquidation or dissolution, all remaining assets shall be distributed and paid over to an organization dedicated to non-profit purposes and has established its tax-exempt status pursuant to Section 501(c)(3) of the IRS Code.

**Section 11. BOND FOR TREASURER** The Board of Directors shall require, at the expense of the Foundation, the Treasurer to give a bond for the faithful discharge of his/her duties as Treasurer and for the restoration to the Foundation of

all its books, papers, vouchers, money and other property of every kind in the Treasurer's possession or under the Treasurer's control, upon the Treasurer's death, resignation, or removal from office, in such sum and with the surety or sureties specified by the Board.

## **ARTICLE IX**

### **CONFLICTS OF INTEREST**

**Section 1. PURPOSE** The Conflict-of-Interest policy is to protect the Foundation's interest when it is contemplating entering into a transaction or arrangement that might benefit the private interest of one of its Directors or Officers. This policy does not replace any applicable state and federal laws governing conflicts of interest applicable to nonprofit and charitable corporations.

**Section 2. DEFINITIONS** In connection with any actual or possible conflict of interest, an interested person must disclose the existence of the financial interest and be given the opportunity to disclose all material facts to the Directors who are considering the proposed transaction or arrangement.

**Section 3. PROCEDURES** After the disclosure of the financial interest and all material facts, the remaining disinterested Directors shall discuss the potential conflict and determine if a conflict of interest exists, outside the presence of the interested Director. If the Board determines that a conflict of interest exists, the Board shall: (1) investigate alternatives to the proposed transaction or arrangement; (2) determine whether the Foundation can obtain, with reasonable efforts, a more advantageous transaction or arrangement from a person or entity that would not give rise to a conflict of interest; (3) if a more advantageous transaction or arrangement is not reasonably possible, the Board shall determine by a majority vote of the disinterested Directors whether the transaction or arrangement is fair and reasonable, and in the best interest of the Foundation. An interested Director shall not participate in any vote on matters in which the Director has a material or financial interest.

**Section 4. RECORDS OF PROCEEDINGS** All minutes of the Board meetings, when applicable, shall contain: (1) the names of all persons who disclosed or otherwise were found to have a financial interest in connection with an actual or possible conflict of interest, the nature of the financial interest, any action taken to determine whether a conflict of interest was present, and the Board's decision as to whether a conflict of interest in fact existed; (2) the names of the persons who were present for discussion and any votes relating to the transaction or arrangement, the content of the discussions, including any alternatives to the proposed transaction or arrangement, and a record of any vote taken in connection with the proceedings.

**Section 5. ANNUAL STATEMENTS** The Foundation shall prepare financial statements and have an audit conducted as required by law. When required by law, such statements shall be audited by an independent certified public accountant,

which is approved by the Oklahoma Department of Education. The Foundation shall make these financial statements available to the Oklahoma Attorney General and members of the public for inspection as required by applicable law.

**Section 6. PERIODIC REVIEWS** The Foundation shall have periodic reviews of the organization's bylaws and related policies. The periodic reviews shall be utilized to ensure that the bylaws remain current, relevant, and in compliance with legal and regulatory requirements.

**Section 7. ACKNOWLEDGEMENT OF CONFLICT OF INTEREST POLICY** Each Officer and voting and ex-officio Director shall be required to sign a statement which affirms that such person (1) has received a copy of the conflict of interest policy; (2) has read and understands the policy; (3) has agreed to comply with the policy; and (4) understands that the Foundation is charitable, and in order to maintain its federal tax exemption, it must engage primarily in activities which accomplish one or more of its tax-exempt purposes.

**Section 8. VIOLATIONS OF CONFLICT OF INTEREST POLICY** Should the Board have reason to believe an interested person has failed to disclose actual or possible conflicts of interest, the Board shall inform the interested person of the basis for such belief and afford the interested person an opportunity to explain the alleged failure to disclose. If the Board determines that the failure to disclose was intentional, the interested Director is subject to removal and the Board may take other corrective action.

**Section 9. VIOLATION OF LOYALTY SELF-DEALING CONTRACTS** A self-dealing contract is any contract or transaction (1) between the Foundation and one or more of its Directors, or between this Foundation and any corporation, firm, or association in which one or more of the Directors has a material financial interest, or (2) between this Foundation and a corporation, firm, or association of which one or more of its directors are Directors of this Foundation. A self-dealing contract shall not be void or voidable, provided:

(a) All material facts are fully disclosed to or otherwise known by the disinterested members of the Board, at the time the self-dealing contract is authorized, approved, or ratified.

(b) All material facts are fully disclosed to or otherwise known by the Board of Directors or committee, the contract is fair and reasonable to the Foundation, and the disinterested Board of Directors or committee authorizes, approves, or ratifies the self-dealing contract in good faith.

The self-dealing Director shall abstain from voting on any contract or matter in which the Director, directly or indirectly, has a material or financial interest.



## **ARTICLE X**

### **GIFTS AND DONATIONS**

**Section 1. RESTRICTED GIFTS AND DONATIONS.** Any gift or donation made to the Foundation from any person, business, or corporation, may be restricted for a particular purpose, program, or activity. Any restricted gift or donation, if accepted by the Board of Directors, shall only be used for the identified purpose, program, or activity. The Board is empowered to reject any restricted gifts and donations.

**Section 2. UNRESTRICTED GIFTS AND DONATIONS.** Any gift or donation received and accepted by the Foundation that is unrestricted shall be used as the Board deems appropriate. Unrestricted gifts and donations may be consolidated with other unrestricted gifts and donations.

## **ARTICLE XI**

### **CORPORATE SEAL, EXECUTION OF INSTRUMENTS, FINANCIAL TRANSACTIONS**

**Section 1. CORPORATE SEAL.** The Foundation shall have a seal approved by the Board of Directors. The seal shall be used in the execution of official Foundation documents and other instruments that have been authorized or approved by the Board of Directors.

### **CERTIFICATION**

I certify that the foregoing is a true and correct copy of the amended Bylaws of the Legacy Learning Foundation, duly approved and adopted by the Board of Directors on the \_\_\_\_\_ day of \_\_\_\_\_, 2023.

\_\_\_\_\_  
Board Chair

\_\_\_\_\_  
Date

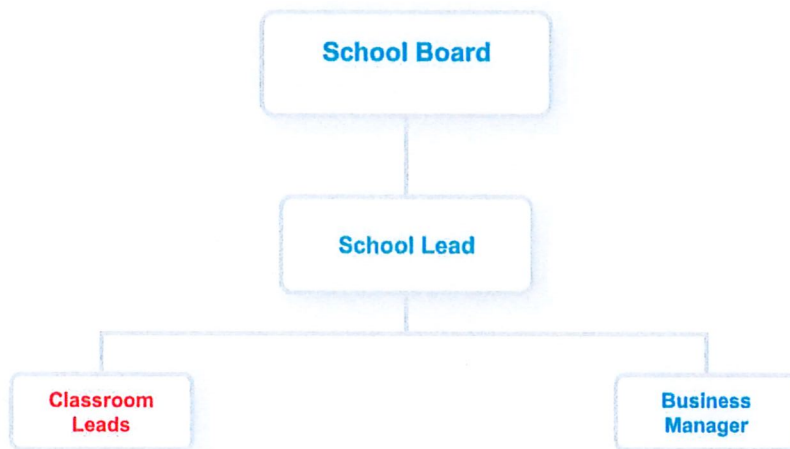
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Secretary

\_\_\_\_\_  
Date

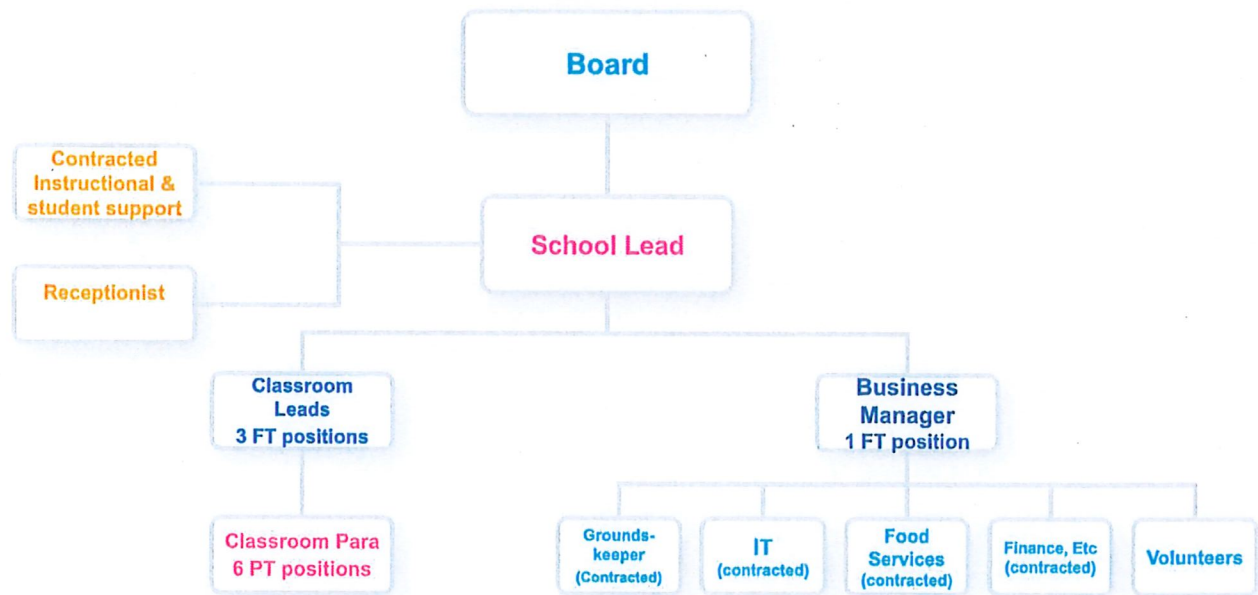
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**Appendix E** Organizational Chart

## P3 Urban Montessori Year One



## P3 Urban Montessori Fully staffed



## **Appendix F Job Descriptions P3 Staff**

## **Classroom Leader Job Description**

### **School Background**

P3 Urban Montessori is the first early childhood public Montessori to be established in Oklahoma City servicing children from the ages of three to five in the Northeast Oklahoma City area. Our Mission is P3 Urban Montessori seeks to provide a culturally responsive Montessori early childhood education to children in Northeast OKC that foster autonomous, competent, responsible, adaptive citizens who are lifelong learners, problem solvers committed to uplifting their community.

### **Role Summary and Information**

- Foster relationships with families as well as their work families to enable open and responsive communication about the student's growth and developmental needs.
- Work hours will be 8:00 am- 3:30 pm Faculty meetings will occur Wednesdays from 5:00 pm- 6:30 pm. This role also requires periodic school events outside the normal work hours. P3 is a trimester school (year-round instructional program).
- Measures of success for the position include student academic growth, family satisfaction, observation feedback, performance evaluation, and related indicators.
- Meaningful professional development and advancement opportunities.
- Reports to the School Leader. Provides direction to classroom Paras, who are formally evaluated by the School Leader.
- Key relationships: Students and Families, and Classroom Paras.

### **Key Responsibilities**

#### **Family Connections**

- Lead classroom family meetings.
- Prepare monthly progress reports and quarterly feedback to share student's progress.

#### **Cultivated Classroom**

- Fostering children in learning to respect studies of the past, develop an understanding of ethics, and value the contributions of others.
- Teaching children to become aware of the interdependence of all things, and develop a sense of gratitude that comes from that awareness.
- Supervise students inside and outside of the classroom, during bathroom and lunch and snack breaks, on the playground, and on field trips (if applicable).



**Planning and Instruction** Submit individual student lesson plans weekly for review and incorporate them into planning.

- Regular observation of students to inform instruction. Record daily observation notes and collect assessment data as needed.
- Prepare Montessori works and literacy material.
- Prepare the learning environment: Plan and implement high-quality instruction for daily individual student lessons in alignment with Montessori Method and the NAMC's individual Early Childhood Curriculum Manuals, and other school plans.
- (if applicable) Teach children of diverse needs in an inclusive environment, implementing appropriate IEP goals with support from the contracted School Support individuals.

### **Professional Development**

- Lead check-in with classroom Para's weekly.
- Engage in teacher meetings, planning, Staff professional development, and data review sessions.
- Conduct informal conversations and collaborative activities daily.
- Other duties as assigned.

### **Qualifications**

- Bachelor's degree recommended but not required
- Experience working with preschool-aged children
- Extremely organized, detail oriented, and responsible individual
- A natural leader who loves to guide and to be guided.

### **Application Process**

Interested candidates should submit a resume, a cover letter, and three references. P3 Urban Montessori does not discriminate on the basis of race, color, gender, handicap, age, religion, sexual orientation, or national or ethnic origin.

## **School Leader Job Description**

### **School Background**

P3 Urban Montessori is the first early childhood public Montessori to be established in Oklahoma City servicing children from the ages of three to five in the Northeast Oklahoma City area. Our Mission is P3 Urban Montessori seeks to provide a culturally responsive Montessori early childhood education to children in Northeast OKC that foster autonomous, competent, responsible, adaptive citizens who are lifelong learners, problem solvers committed to uplifting their community.

### **Role Summary and Information**

- Foster relationships with families as well as their work families to enable open and responsive communication about the student's growth and developmental needs
- Salary position with flex hours to meet the needs of the business needs of the school and families.
- Measures of success for the position include the overall school's academic growth, family satisfaction, Classroom Leads observation feedback, performance evaluation, and related indicators.
- Meaningful professional development and advancement opportunities.
- Reports to the Board.
- Provides direction to and formally evaluates the Classroom Leads.
- Key relationships: Board, Students, Families, Teachers and support staff.

### **Key Responsibilities**

- Oversight of school's day-to-day Operations
- Review and implementation of school policies
- Interview and hire school personnel
- Research new resources and techniques to improve teaching and learning
- Manage school logistics and budgets
- Monitor and report teacher performance
- Present data from school performance to the Board members
- Set learning goals for students and teachers based on national curricula
- Handle emergencies and school crises

## **Qualifications**

- Previous experience as a School leader, Principal or in a similar capacity
- Knowledge of school administrative process and national education regulations
- Hands on experience with MS office as well as education management systems
- Attention to detail
- Crisis management skills
- Facility to coach and inspire others
- Degree in Education, Master degree preferred but not required
- Great presentation and communication skills

## **Cultivated School Culture**

- Helping students, teachers, and parents identify with the school's core values, mission, and vision.
- Character development, nurturing a well-rounded and socially responsible student body.
- Create a theme across various ages cultivating habits of curiosity, inquiry, and critical thinking that extend beyond the classroom.
- Enhancing Teacher Collaborations via Collaboration across teachers strengthening relationships and enriching the curriculum.
- Alumni connection and a continuous legacy through maintaining connections of Parents and students upon leaving Children's house.

## **Professional Development**

- Planning of high quality professional development for staff.
- Conduct informal conversations and collaborative activities daily.
- Work with staff and have a strong understanding of their long and short term goals.
- Set SMART (Specific, Measurable, Achievable, Relevant, and Timely) goals for school and staff improvement.

## **Application Process**

Interested candidates should submit a resume, a cover letter, and three references. P3 Urban Montessori does not discriminate on the basis of race, color, gender, handicap, age, religion, sexual orientation, or national or ethnic origin.

## **School Business Manager**

### **School Background**

P3 Urban Montessori is the first early childhood public Montessori to be established in Oklahoma City servicing children from the ages of three to five in the Northeast Oklahoma City area. Our Mission is P3 Urban Montessori seeks to provide a culturally responsive Montessori early childhood education to children in Northeast OKC that foster autonomous, competent, responsible, adaptive citizens who are lifelong learners, problem solvers committed to uplifting their community.

### **Duties and Responsibilities**

- Supervise and evaluate all non instructional classified staff at the site.
- Manage all school scheduling, special events, field trips, food services, maintenance, playground upkeep and cleaning.
- Manage the communities use of the school site (in partnership with facility owner)
- Manage school budget (including the role of the encumbrance clerk)
- Responsible for the school safety plan; Disaster preparation, fire drills, tornado drill, student, staff and public safety, and student health.
- Maintain equipment, Montessori materials, and supply inventories.
- Monitor student attendance and coordinate efforts to improve student attendance.
- Coordinate with the School Leader to maintain a positive, safe learning environment for all students by enforcing the school code of conduct.
- Responsible for school relations and communication plan: promote the school through positive relations with businesses, the community, parents, staff and students.
- Perform other duties as assigned.

### **Knowledge and Abilities:**

- Oral and written communication skills.
- Modern office practices, procedures, and equipment.
- Practice policies and procedures involved in the functional area assigned.
- Laws, rules and regulations related to assigned activities.
- Interpersonal skills using tact, patients and courtesy.
- Health and Safety regulations.
- Principles and practices of administration, supervision and training.
- Budget preparation and control.
- Student discipline policies, procedures, laws and regulations.

### **Ability to:**

- Plan, organize, coordinate and control large group events, classified meetings, and community and family engagement events.
- Communicate effectively using speech, vision, hearing and writing.
- Prepare and deliver oral presentations.
- Work cooperatively with others.
- Establish and maintain cooperative and effective working relationships with others.
- Investigate circumstances of employee on-the-job- injuries; prepare required documentation; and report safety hazards to the School Leader.
- Maintain records and prepare reports.
- Practice and schedule work.
- Train, supervise and evaluate personnel.
- Maintain current knowledge of technology advance in the field.
- Analyze situations accurately and adopt an effective course of action.
- Meet schedules and strict deadlines.
- Use a computer, telephone and an alarm system proficiently.
- Manage conflict.
- Understand and work within a scope of authority.
- Scrutinizes facility wear and tear makes recommendations as to facility improvements (i.e., rugs replacement, interior paint, turf, etc)
- Performance annual performance audits in collaboration with the School Leader.

### **Application Process**

Interested candidates should submit a resume, a cover letter, and three references. P3 Urban Montessori does not discriminate on the basis of race, color, gender, handicap, age, religion, sexual orientation, or national or ethnic origin.

## **School ParaProfessional**

### **School Background**

P3 Urban Montessori is the first early childhood public Montessori to be established in Oklahoma City servicing children from the ages of three to five in the Northeast Oklahoma City area. Our Mission is P3 Urban Montessori seeks to provide a culturally responsive Montessori early childhood education to children in Northeast OKC that foster autonomous, competent, responsible, adaptive citizens who are lifelong learners, problem solvers committed to uplifting their community.

### **Duties and Responsibilities**

- Provide classroom support and supervision of students under the direction of the supervisor. Provide enrichment and intervention time.
- Work with individual or small groups of students to support and reinforce teacher structured work centers.
- Provide enrichment and intervention time using Montessori-provided materials or activities
- Work hours will rotate to accommodate the school's hours of 7:00 am-5:30 pm Monday through Friday.
- Supervise and manage student behavior as assigned.
- Administer or assist with classroom assessments
- Perform clerical duties such as filing, copying, and organizing student records.
- Perform other duties as assigned by the Classroom Leader.

### **Education/ Training**

- High school diploma/GED required. Jeffco paraprofessional training will be offered upon acceptance of a position and must be completed at the first available training opportunity.

### **Skills, Knowledge, and equipment**

- Requires basic language, math, writing and communication skills. Knowledge of general office equipment preferred.

### **Experience**

- Previous experience in a school setting is preferred but not required.

## **Physical Demands**

- While performing the duties of this job, the employee is regularly required to use hands to finger, handle, or feel; reach with hands and arms; and talk or hear. The employee frequently is required to stand, walk, and sit. The employee is occasionally required to climb or balance and stoop, kneel, or crouch. The employee must occasionally lift and/or move up to 25 pounds.

## **Judgment and Decision making**

- Work is assigned by the classroom teacher. This position requires ability to make decisions and follow instructions of the classroom teacher and school guidelines. Errors in decision making could lead to improper instructions for students, or improper behavior management of students. Decision making requires collaboration with the supervisor.

## **Application Process**

Interested candidates should submit a resume, a cover letter, and three references. P3 Urban Montessori does not discriminate on the basis of race, color, gender, handicap, age, religion, sexual orientation, or national or ethnic origin.

## **Appendix G** Timeline for Opening



TIMELINE FOR SCHOOL OPENING		
MONTH	CRITICAL STEPS	Date of Completion
August 2023	<ul style="list-style-type: none"> <li>*Gathering letters of Community Support (ongoing) (O)</li> <li>*Completion of Charter Application (O)</li> <li>*Separate 501C3 has been completed for the school entity (O)</li> <li>*Get banking established for 501C3 (Legacy Learning) (G)</li> <li>*Board meeting agenda -Updated each month (G)</li> <li>*Federal EIN number established (G)</li> </ul>	
September 2023	<ul style="list-style-type: none"> <li>*Applications turned into OKCPS 9/01 (O)</li> <li>*Ensure all letter of Support have been submitted by 8/22</li> <li>*Schedule a visit to Tulsa Montessori schools (O)</li> <li>*Finalize school calendar (including PD days)</li> <li>*Establish a Board Calendar for the Fiscal year (G)</li> <li>*Board meeting agenda -Updated each month (G)</li> <li>*Gathering letters of Community Support (ongoing)</li> </ul>	
October 2023	<ul style="list-style-type: none"> <li>*Board meeting- Agenda updated each month (G)</li> <li>*Revise Application for resubmission (O)</li> <li>*Finalize Bylaws (Board) and become a Governance board (G)</li> <li>*Finalize student enrollment process</li> <li>*Begin initial Facility locations and speak with individuals about Barndo design</li> <li>*Gathering letters of Community Support (ongoing)</li> <li>*Clarify hiring dates, Staffing structure, and year one student enrollment (students entry age)</li> </ul>	
November 2023	<ul style="list-style-type: none"> <li>*Board meeting- Agenda updated each month (G)</li> <li>*Application is approved or resubmitted at the state level</li> <li>*(upon approval) Apply for Start-up Funding</li> <li>*Finalize Bylaws (Board) and transition to Governance Board</li> <li>*Board policies Conflict of Interest, Grievance background checks (G)</li> <li>*Gathering letters of Community Support (ongoing)</li> </ul>	
December 2023	<ul style="list-style-type: none"> <li>*Board meeting- Agenda updated each month (G)</li> <li>*Launch Website (post job descriptions, Student enrollment timeline and information (forms and information session dates)</li> <li>*Gathering letters of Community Support (ongoing)</li> <li>*Resubmit Application to OKCPS with revisions</li> </ul>	
January 2024	<ul style="list-style-type: none"> <li>*Board meeting- Agenda updated each month (G)</li> <li>*Student Handbook created (G)</li> <li>*Parent Handbook created (G)</li> <li>*School nursing policy established (O)</li> <li>*Policies and documents in place for volunteering</li> <li>*Community outreach meeting (ongoing) (O)</li> </ul>	
February 2024	<ul style="list-style-type: none"> <li>*Board meeting- Agenda updated each month (G)</li> <li>*Location for school has been established (F/O)</li> <li>*Obtain a Certificate of Occupancy (F)</li> </ul>	
March 2024	<ul style="list-style-type: none"> <li>*Board meeting- Agenda updated each month (G)</li> <li>*Attend the Montessori Event March 7-10th (O)</li> <li>*Board meeting agenda -Updated each month (G)</li> <li>*Board members have completed background checks (O)</li> <li>*Economic and conflict of Interest paperwork from Board (G)</li> <li>*Community outreach meeting (ongoing) (O)</li> </ul>	
April 2024	<ul style="list-style-type: none"> <li>*Board meeting- Agenda updated each month (G)</li> <li>*Obtain School Code from SDOE</li> </ul>	
May 2024	<ul style="list-style-type: none"> <li>*Board meeting- Agenda updated each month (G)</li> <li>*Fully functioning governance board Board (G) -upon getting school number</li> <li>*Research pricing for furniture, supplies, technology (O)</li> <li>*Established Payroll system (O)</li> <li>*Community outreach meeting (ongoing) (O)</li> </ul>	

MONTH	CRITICAL STEPS	Date of Completion
June 2024	*Board meeting- Agenda updated each month (G) *A payroll system has been established (O)	
July 2024	*Board meeting- Agenda updated each month (G) * New School head hired (O/G) *Community outreach meeting (ongoing) (O) *Obtain evidence of all necessary inspections (F) *Obtain evidence of insurance (F) *Finalize lease or Purchase agreement (F) *Process for drop off and pick up (F)	
August 2024	*Board meeting- Agenda updated each month (G) *Continuous with operational processes and school preparation (O)	
September 2024	*Board meeting- Agenda updated each month (G) *Continuous with operational processes and school preparation (O)	
October 2024	*Board meeting- Agenda updated each month (G) *Continuous with operational processes and school preparation (O)	
November 2024	*Board meeting- Agenda updated each month (G) *Community Outreach (ongoing) (O) *Student Recruitment (ongoing) (O) *Staff recruitment (Ongoing) (O) *Set-up the school website (O) *Get legal counsel quotes and retain a lawyer (O) * Local Police, fire, and EMSA have been notified of the new school (O) *Continuous with operational processes and school preparation (O)	
December 2024	*Board meeting- Agenda updated each month (G) *Community Outreach (ongoing) (O) *Student Recruitment (ongoing) (O) *Staff recruitment (Ongoing) (O) *Finalize Facilities location-Obtain site approval and Architectural review (F) *Evidence of all required Insurances. (O) *School calendar approved by the Board for 2025-2026 school year (G)	
January 2025	*Board meeting- Agenda updated each month (G) *Purchase materials, negotiate vendor contracts, and establish community partnerships (ongoing) (O) *Community Outreach (ongoing) (O) *Student Recruitment (ongoing) (O) *Staff recruitment (Ongoing) (O) *Name of Board members placed on website (O) *Place utilities on in the school's name. (O) *Accounting system with internal controls in place (O) *Contact with with accountant or bookkeeper (O) *Bank account established (O) *OSDE state account compliance (O) *Create a monthly cash flow projection for the school year (O)	



MONTH	CRITICAL STEPS	Date of Completion
February 2025	*Board meeting- Agenda updated each month (G) *Conduct Admission lottery and Notify Families *Waitlist Development (ongoing) (O) *Begin open enrollment for inaugural class (O) *Locked storage for medications, staff and student documentation (O) *Student Recruitment (ongoing) (O) *Set meeting time and post in Accordance to Open Meeting Law	
March 2025	*Board meeting- Agenda updated each month (G) *Prepare facilities for occupants (permits, inspections, and insurance) *Waitlist Development (ongoing) (O) *Open enrollment closes accept all qualified ages or create a lottery if over the capacity number (O) *Lottery day 15th of March (O) *Arrangements have been made for food services (O) *Written detailed plan for emergency processes. (O)	
April 2025	*Board meeting- Agenda updated each month (G) *Orientation for newly hired staff (O) *Teacher's training (night training) *School calendars available for Open house *Procedures are in place for creating, storing, securing and using student academic, attendance, discipline, and observations. *Student health records are separate from academics and locked for privacy. *Locked cabinet for employee records. (O) *School has established a fiscal management and oversight policies (O) *Establish drop off and pick-up area. (F)	
May 2025	*Board meeting- Agenda updated each month (G) *Delivery of all Supplies and Materials (O) *Waitlist development (ongoing) (O) *School Signage- Safety and evacuation plan in each classroom (F) *School Signage- Exit and fire emergency evacuation signage are posted (F) *School Signage- Exterior signage identifying the charter school by name and address is in place (F) *Posting and Policies- Ensure state and federal laws are posted in an area that staff can readily access and review them. (F) *Posting and Policies- A copy of school's complaint policy is on file in the schools office and accessible to Parents. (F) *School leadership positions have been filled (O)	
June 2025	*Board meeting- Agenda updated each month (G) *Parent and Family Orientation *Finalize Facilities (O/G) *Waitlist Development (ongoing) (O) *Instructional materials delivered to each classroom (O) *One roster available of students who be attending (O)	
July 2025	*Board meeting- Agenda updated each month (G) *Parent Student Orientation *School Begins	
August 2025	*Board meeting- Agenda updated each month (G)	
	Coding (G) Governance (F) Facilities (O) Operations	

## **Appendix H School Calendar**

# 2025-2026 P3 Urban Montessori

July 2025						
Su	M	Tu	W	Th	F	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

August 2025						
Su	M	Tu	W	Th	F	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

September 2025						
Su	M	Tu	W	Th	F	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

October 2025						
Su	M	Tu	W	Th	F	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

November 2025						
Su	M	Tu	W	Th	F	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

December 2025						
Su	M	Tu	W	Th	F	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

## July

21-25 Professional Development/classroom set-up  
28 First day of School

January 2026						
Su	M	Tu	W	Th	F	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

February 2026						
Su	M	Tu	W	Th	F	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28

March 2026						
Su	M	Tu	W	Th	F	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

April 2026						
Su	M	Tu	W	Th	F	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

May 2026						
Su	M	Tu	W	Th	F	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

June 2026						
Su	M	Tu	W	Th	F	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

## January

1-2 Winter Break  
19 Martin Luther King Jr Observed (Holiday)

16-20 Spring Break (no classes)

25 Memorial Day (Holiday)  
22 No School (Professional Development)

## June

19 Juneteenth (Holiday)  
22-30 Summer Break

## **Appendix I Budget Plan**



### P3 Urban Montessori 5 year Budget

Year

Revenue	Planning	Year 1	Year 2	Year 3	Year 4	Year 5
<b>State Aid</b>						
State Aid based on WADM	\$ -	\$ 282,188.58	\$ 596,954.59	\$ 596,954.59	\$ 596,954.59	\$ 601,116.51
Authorizer Fee (Deduction off of income)	\$ -	\$ (2,821.89)	\$ (5,969.55)	\$ (5,969.55)	\$ (5,969.55)	\$ (6,011.17)
State Textbook	\$ -	\$ -	\$ 4,900.00	\$ 4,900.00	\$ 4,900.00	\$ 4,900.00
Reading Sufficiency	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Remediation	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Professional Development	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Flex Benefit	\$ -	\$ 25,375.00	\$ 83,375.00	\$ 87,000.00	\$ 83,375.00	\$ 83,375.00
ACE Technology	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Federal NSLP (Breakfast and Lunch)		\$ 72,000.00	\$ 72,000.00	\$ 72,000.00	\$ 72,000.00	\$ 72,000.00

#### Federal Programs

Title I	\$ -	\$ -	\$ 20,315.25	\$ 36,180.00	\$ 36,180.00	\$ 36,180.00
Title II	\$ -	\$ -	\$ 2,534.76	\$ 4,506.24	\$ 4,506.24	\$ 4,506.24
Grants (of \$900k applied for)	\$ 300,000.00	\$ -	\$ -	\$ -	\$ -	\$ -
Indian Ed	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Title VI	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
IDEA Funds	\$ -	\$ -	\$ 2,263.17	\$ 4,023.42	\$ 4,023.42	\$ 4,023.42

#### Local Funds

Balance Forward from Previous Fiscal Year (Carryover)		\$ -	\$ 34,301.69	\$ 87,956.82	\$ 113,550.67	\$ 130,377.78
Fundraising	\$ -					
<b>Income Total</b>	<b>\$ 300,000.00</b>	<b>\$ 376,741.69</b>	<b>\$ 810,674.92</b>	<b>\$ 887,551.52</b>	<b>\$ 909,520.37</b>	<b>\$ 930,467.79</b>

#### Expenses

<b>Salary Cost</b>						
Administrative Salary	\$ 60,000.00	\$ 65,000.00	\$ 131,950.00	\$ 133,930.00	\$ 135,940.00	\$ 137,980.00
Staff	\$ 31,000.00	\$ 63,000.00	\$ 283,725.00	\$ 312,534.50	\$ 303,555.00	\$ 309,151.00
Benefits	\$ 11,875.00	\$ 37,640.00	\$ 114,993.10	\$ 122,486.36	\$ 121,097.59	\$ 123,086.69
<b>Total Salary and Benefit</b>	<b>\$ 102,875.00</b>	<b>\$ 165,640.00</b>	<b>\$ 530,668.10</b>	<b>\$ 568,950.86</b>	<b>\$ 560,592.59</b>	<b>\$ 570,217.69</b>

Payroll % (=Total Salary and Benefits/Income Total) Target 65%

43.97%

65.46%

64.10%

61.64%

61.28%

#### Facility Expenses

Building Lease	\$ -	\$ 12,000.00	\$ 12,000.00	\$ 12,000.00	\$ 12,000.00	\$ 12,000.00
Renovation Costs	\$ -					
Janitorial	\$ -	\$ 10,000.00	\$ 10,000.00	\$ 15,000.00	\$ 15,000.00	\$ 15,000.00
Insurance	\$ 5,000.00	\$ 12,500.00	\$ 18,000.00	\$ 24,000.00	\$ 24,000.00	\$ 24,000.00
Furniture Purchase	\$ 75,500.00	\$ 5,000.00	\$ 5,000.00	\$ 2,500.00	\$ 2,500.00	\$ 2,500.00
Purchased Services (lawn care, waste and trash removal)	\$ 2,000.00	\$ 3,500.00	\$ 3,500.00	\$ 3,500.00	\$ 3,500.00	\$ 3,500.00
Repairs and Maintenance	\$ 7,500.00	\$ 8,800.00	\$ 5,500.00	\$ 5,500.00	\$ 7,000.00	\$ 7,500.00

Utilities (including gas, electric, water, ISP/phone)	\$ 5,000.00	\$ 10,000.00	\$ 13,550.00	\$ 13,550.00	\$ 13,550.00	\$ 13,550.00
<b>Facility Total</b>	<b>\$ 95,000.00</b>	<b>\$ 61,800.00</b>	<b>\$ 67,550.00</b>	<b>\$ 76,050.00</b>	<b>\$ 77,550.00</b>	<b>\$ 78,050.00</b>

#### Other Expenses

Transportation (including field trips)		\$ 2,000.00	\$ 2,000.00	\$ 3,500.00	\$ 4,000.00	\$ 3,000.00
Professional Services (Legal, Accountant, Audit, etc.)		\$ 10,000.00	\$ 15,000.00	\$ 18,000.00	\$ 18,000.00	\$ 15,000.00
Professional Services (Student Supports - speech, social work,		\$ 5,000.00	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00
Postage and Mailing		\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,500.00	\$ 1,800.00
Professional Development (Workshops and Conferences)	\$ 28,000.00	\$ 4,000.00	\$ 8,000.00	\$ 8,000.00	\$ 14,500.00	\$ 14,500.00
Student Information System		\$ 5,000.00	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00
Federal NSLP (Breakfast and Lunch)		\$ 76,000.00	\$ 76,000.00	\$ 76,000.00	\$ 76,000.00	\$ 76,000.00
Text Books	\$ 22,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00
Teaching Supplies	\$ 20,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 5,000.00	\$ 8,000.00
Copier and Printers	\$ 10,000.00	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00
Computers/lpads/Chromebooks, etc...	\$ 22,000.00	\$ 3,000.00	\$ 3,500.00	\$ 3,500.00	\$ 5,000.00	\$ 18,500.00
<b>Other Expense Total</b>	<b>\$ 102,000.00</b>	<b>\$ 115,000.00</b>	<b>\$ 124,500.00</b>	<b>\$ 129,000.00</b>	<b>\$ 141,000.00</b>	<b>\$ 153,800.00</b>
<b>Expense Total</b>	<b>\$ 299,875.00</b>	<b>\$ 342,440.00</b>	<b>\$ 722,718.10</b>	<b>\$ 774,000.86</b>	<b>\$ 779,142.59</b>	<b>\$ 802,067.69</b>
Previous Year Carryover		\$ -	\$ 34,301.69	\$ 87,956.82	\$ 113,550.67	\$ 130,377.78
New Income Total	\$ 300,000.00	\$ 376,741.69	\$ 776,373.22	\$ 799,594.70	\$ 795,969.70	\$ 800,090.01
<b>Income Total</b>	<b>\$ 300,000.00</b>	<b>\$ 376,741.69</b>	<b>\$ 810,674.92</b>	<b>\$ 887,551.52</b>	<b>\$ 909,520.37</b>	<b>\$ 930,467.79</b>
<b>Expense Total</b>	<b>\$ (299,875.00)</b>	<b>\$ (342,440.00)</b>	<b>\$ (722,718.10)</b>	<b>\$ (774,000.86)</b>	<b>\$ (779,142.59)</b>	<b>\$ (802,067.69)</b>
Carryover	\$ 125.00	\$ 34,301.69	\$ 87,956.82	\$ 113,550.67	\$ 130,377.78	\$ 128,400.10
Carryover % (=Carryover/Income Total) Target 10%+		9.10%	10.85%	12.79%	14.33%	13.80%

100's	Salaries	\$ 128,000.00	\$ 415,675.00	\$ 446,464.50	\$ 439,495.00	\$ 447,131.00
200's	Burdens	\$ 37,640.00	\$ 114,993.10	\$ 122,486.36	\$ 121,097.59	\$ 123,086.69
300-500's	Services	\$ 117,500.00	\$ 132,000.00	\$ 141,000.00	\$ 147,500.00	\$ 144,500.00
600's	Supplies	\$ 23,800.00	\$ 24,050.00	\$ 24,050.00	\$ 29,050.00	\$ 32,850.00
700's	Capital Expenditure	\$ 15,500.00	\$ 15,500.00	\$ 15,500.00	\$ 15,500.00	\$ 15,500.00



Planned Annual Salary Increase

Admin increase 1.5%

Teachers 2%

Teacher's Aides 2%

Receptionist 2%

2025 WADM Projections			
PK 3		1.2	0
PK H		0.7	0
PK F		1.3	0
K	40	1.5	60
1		1.351	0
2		1.351	0
3		1.051	0
4		1	0
5		1	0
6		1	0
7		1.2	0
8		1.2	0
9		1.2	0
10		1.2	0
11		1.2	0
12		1.2	0
	40		60

Year One WADM Projections			
	Projected	ADM	Student
ADM Grade Weight		40	20
G/T (.35)	8%	3.2	1.12
Econ Disadv (.25)	60%	24	6
Spec Ed	17%	7.65	0.3825
Bilingual (.25)	3%	1.2	0.3
Student Weights			27.8025
SUM Total		40	67.8025
Small School		0	0
Isolation		0	0
Teacher Index		0	0
TOTAL		40	67.8025

State Aid Factor	\$4,161.92
State Aid	\$ 282,188.58

2026 Projections			
	ADM	Weight	WADM
PK 3		1.2	0
PK H		0.7	0
PK F	50	1.3	65
K	40	1.5	60
1		1.351	0
2		1.351	0
3		1.051	0
4		1	0
5		1	0
6		1	0
7		1.2	0
8		1.2	0
9		1.2	0
10		1.2	0
11		1.2	0
12		1.2	0
	90		125

Year Two Projections			
	Projected	ADM	Student Weight
ADM Grade Weight		90	35
G/T (.35)	8%	7.2	2.52
Econ Disadv (.25)	65%	58.5	14.625
Spec Ed	17%	13.6	0.68
Bilingual (.25)	3%	2.43	0.6075
Student Weights			53.4325
SUM Total		90	143.4325
Small School		0	0
Isolation		0	0
Teacher Index		0	0
TOTAL		90	143.4325

State Aid Factor	\$4,161.92
State Aid	\$ 596,954.59

2027 Projections			
	ADM	Weight	WADM
PK 3		1.2	0
PK H		0.7	0
PK F	50	1.3	65
K	40	1.5	60
1		1.351	0
2		1.351	0
3		1.051	0
4		1	0
5		1	0
6		1	0
7		1.2	0
8		1.2	0
9		1.2	0
10		1.2	0
11		1.2	0
12		1.2	0
	90		125

Year Three Projections			
	Projected	ADM	Student Weight
ADM Grade Weight		90	35
G/T (.35)	8%	7.2	2.52
Econ Disadv (.25)	65%	58.5	14.625
Spec Ed	17%	13.6	0.68
Bilingual (.25)	3%	2.43	0.6075
Student Weights			53.4325
SUM Total		90	143.4325
Small School		0	0
Isolation		0	0
Teacher Index		0	0
TOTAL		90	143.4325

State Aid Factor	\$4,161.92
State Aid	\$ 596,954.59

2028 Projections			
	ADM	Weight	WADM
PK 3		1.2	0
PK H		0.7	0
PK F	50	1.3	65
K	40	1.5	60
1		1.351	0
2		1.351	0
3		1.051	0
4		1	0
5		1	0
6		1	0
7		1.2	0
8		1.2	0
9		1.2	0
10		1.2	0
11		1.2	0
12		1.2	0
	90		125

2029 Projections			
	ADM	Weight	WADM
PK 3		1.2	0
PK H		0.7	0
PK F	45	1.3	58.5
K	45	1.5	67.5
1		1.351	0
2		1.351	0
3		1.051	0
4		1	0
5		1	0
6		1	0
7		1.2	0
8		1.2	0
9		1.2	0
10		1.2	0
11		1.2	0
12		1.2	0
	90		126

Year Four Projections			
	Projected	ADM	Student Weight
ADM Grade Weight		90	35
G/T (.35)	8%	7.2	2.52
Econ Disadv (.25)	65%	58.5	14.625
Spec Ed	17%	13.6	0.68
Bilingual (.25)	3%	2.43	0.6075
Student Weights			53.4325
SUM Total		90	143.4325
Small School		0	0
Isolation		0	0
Teacher Index		0	0
TOTAL		90	143.4325

Year Five Projections			
	Projected	ADM	Student Weight
ADM Grade Weight		90	36
G/T (.35)	8%	7.2	2.52
Econ Disadv (.25)	65%	58.5	14.625
Spec Ed	17%	13.6	0.68
Bilingual (.25)	3%	2.43	0.6075
Student Weights			54.4325
SUM Total		90	144.4325
Small School		0	0
Isolation		0	0
Teacher Index		0	0
TOTAL		90	144.4325

State Aid Factor	\$4,161.92
State Aid	\$ 596,954.59

State Aid Factor	\$4,161.92
State Aid	\$ 601,116.51

Year One (Planning)										
Base Salary Calculation							Total Payroll			
	Base Salary	Health Insurance	Benefits	Extra Duty	Total		Employees	Base Salary	Extra Duty	Total Salary and Benefits
Admin	\$65,000.00	\$7,500.00	\$16,250.00		\$ 88,750.00		0.50	\$ 32,500.00	\$ -	\$ 44,375.00
Operations Manager	\$65,000.00	\$ -	\$16,250.00		\$ 81,250.00		0.50	\$ 32,500.00	\$ -	\$ 40,625.00
Teacher	\$42,000.00	\$ -	\$11,760.00		\$ 53,760.00		1.50	\$ 63,000.00	\$ -	\$ 80,640.00
Teacher's Aide	\$ -	\$ -	\$ -		\$ -		0.00	\$ -	\$ -	\$ -
Special Education Teacher	\$ -	\$ -	\$ -	\$ -	\$ -		1.00	\$ -	\$ -	\$ -
Receptionist	\$18,000.00	\$ -	\$ 4,500.00		\$ 22,500.00		0.00	\$ -	\$ -	\$ -
						Total	3.50	\$128,000.00	\$ -	\$ 37,640.00
										\$ 165,640.00

Year Two										
Base Salary Calculation							Total Payroll			
	Base Salary	Health Insurance	Benefits	Extra Duty	Total		Employees	Base Salary	Extra Duty	Total Salary and Benefits
Admin	\$65,975.00	\$7,500.00	\$16,493.75		\$ 89,968.75		1.00	\$ 65,975.00	\$ -	\$ 89,968.75
Operations Manager	\$65,975.00	\$ -	\$16,493.75		\$ 82,468.75		1.00	\$ 65,975.00	\$ -	\$ 82,468.75
Teacher	\$42,840.00	\$ -	\$11,995.20		\$ 54,835.20		3.00	\$128,520.00	\$ -	\$ 164,505.60
Teacher's Aide	\$20,400.00	\$ -	\$ 5,100.00		\$ 25,500.00		6.00	\$122,400.00	\$ -	\$ 153,000.00
Special Education Teacher	\$45,000.00	\$ -	\$11,250.00	\$2,250.00	\$ 58,500.00		0.50	\$ 22,500.00	\$1,125.00	\$ 29,250.00
Receptionist	\$18,360.00	\$ -	\$ 4,590.00		\$ 22,950.00		0.50	\$ 9,180.00	\$ -	\$ 11,475.00
						Total	11.50	\$414,550.00	\$1,125.00	\$ 530,668.10

Year Three										
Base Salary Calculation							Total Payroll			
	Base Salary	Health	Benefits	Extra Duty	Total		Employees	Base Salary	Extra Duty	Total Salary
Admin	\$66,965.00	\$7,500.00	\$16,741.25		\$ 91,206.25		1.00	\$ 66,965.00	\$ -	\$ 91,206.25
Operations Manager	\$66,965.00	\$ -	\$16,741.25		\$ 83,706.25		1.00	\$ 66,965.00	\$ -	\$ 83,706.25
Teacher	\$43,697.00	\$ -	\$12,235.16		\$ 55,932.16		3.00	\$131,091.00	\$ -	\$ 167,796.48
Teacher's Aide	\$20,805.00	\$ -	\$ 5,201.25		\$ 26,006.25		6.00	\$124,830.00	\$ -	\$ 156,037.50
Special Education Teacher	\$45,000.00	\$ -	\$11,250.00	\$2,250.00	\$ 58,500.00		1.00	\$ 45,000.00	\$2,250.00	\$ 58,500.00
Receptionist	\$18,727.00	\$ -	\$ 4,681.75		\$ 23,408.75		0.50	\$ 9,363.50	\$ -	\$ 11,704.38
						Total	12.00	\$444,214.50	\$2,250.00	\$ 568,950.86

Year Four										
Base Salary Calculation							Total Payroll			
	Base Salary	Health	Benefits	Extra Duty	Total		Employees	Base Salary	Extra Duty	Total Salary
Admin	\$67,970.00	\$7,500.00	\$16,992.50		\$ 92,462.50		1.00	\$ 67,970.00	\$ -	\$ 92,462.50
Operations Manager	\$67,970.00	\$ -	\$16,992.50		\$ 84,962.50		1.00	\$ 67,970.00	\$ -	\$ 84,962.50

Teacher	\$44,501.00	\$ -	\$12,460.28		\$ 56,961.28		3.00	\$133,503.00	\$ -	\$ 37,380.84	\$ 170,883.84
Teacher's Aide	\$21,221.00	\$ -	\$ 5,305.25		\$ 26,526.25		6.00	\$127,326.00	\$ -	\$ 31,831.50	\$ 159,157.50
Special Education Teacher	\$45,000.00	\$ -	\$11,250.00	\$2,250.00	\$ 58,500.00		0.50	\$ 22,500.00	\$1,125.00	\$ 5,625.00	\$ 29,250.00
Receptionist	\$19,101.00	\$ -	\$ 4,775.25		\$ 23,876.25		1.00	\$ 19,101.00	\$ -	\$ 4,775.25	\$ 23,876.25
						Total	11.50	\$438,370.00	\$1,125.00	\$121,097.59	\$ 560,592.59

Year Five										
Base Salary Calculation						Total Payroll				
	Base Salary	Health	Benefits	Extra Duty	Total	Employees	Base Salary	Extra Duty	Benefits	Total Salary
Operations Manager	\$68,990.00	\$7,500.00	\$17,247.50		\$ 93,737.50	1.00	\$ 68,990.00	\$ -	\$ 24,747.50	\$ 93,737.50
Operations Manager	\$68,990.00	\$ -	\$17,247.50		\$ 86,237.50	1.00	\$ 68,990.00	\$ -	\$ 17,247.50	\$ 86,237.50
Teacher	\$45,391.00	\$ -	\$12,709.48		\$ 58,100.48	3.00	\$136,173.00	\$ -	\$ 38,128.44	\$ 174,301.44
Teacher's Aide	\$21,645.00	\$ -	\$ 5,411.25		\$ 27,056.25	6.00	\$129,870.00	\$ -	\$ 32,467.50	\$ 162,337.50
Special Education Teacher	\$45,000.00	\$ -	\$11,250.00	\$2,250.00	\$ 58,500.00	0.50	\$ 22,500.00	\$1,125.00	\$ 5,625.00	\$ 29,250.00
Receptionist	\$19,483.00	\$ -	\$ 4,870.75		\$ 24,353.75	1.00	\$ 19,483.00	\$ -	\$ 4,870.75	\$ 24,353.75
						Total	11.50	\$446,006.00	\$1,125.00	\$123,086.69

## **Appendix J School Treasurer and Encumbrance Clerk**

## **P3 Urban Montessori School Treasurer**

### **School Background**

P3 Urban Montessori is the first public Montessori to be established in Oklahoma City servicing children from the ages of three to five in the Northeast Oklahoma City area. Our Mission is P3 Urban Montessori seeks to provide a culturally responsive Montessori early childhood education to children in Northeast OKC that fosters autonomous, competent, responsible, adaptive citizens who are lifelong learners, problem solvers committed to uplifting their community.

### **Qualifications should be as follows:**

- Knowledge of State School Laws, P3's school financial policies, and Oklahoma Cost Accounting System (OCAS) requirements
- Knowledge of principles, practices, regulations, and procedures as they relate to purchasing and accounts payable
- Knowledge of the application of data processing techniques in automated accounting systems.
- Skills in customer service / public relations
- Skills in verbal and written communication
- Strong analytical and problem-solving skills with attention to detail
- Proficient math and organization skills
- Ability to balance independent and team collaboration

### **Maintain adequate files of:**

- Paid and Voided Warrants
- Paid and Canceled Bonds and Coupons

**Maintain adequate files (continued)**

- Bank and fiscal agency statements
- Directives from the County Clerk or County Excise Board affecting the district's appropriation balances OSDE allocations of State and Federal Aid
- Board resolutions, letters, memos, or other supporting data pertinent to the district or treasurer

**Essential Job Functions - (Majority of duties performed, but not meant to be all-inclusive nor prevent other duties from being assigned as necessary):**

- Monitor purchase requisitions for accuracy and proper approval
- Process activity fund purchase orders, including payment
- Review and close encumbrances and purchase orders on a monthly basis
- Maintain vendor files, correspond with vendors, and respond to inquiries
- Field and answer questions from school personnel and the public
- Research and resolve invoice discrepancies and issues
- Provide support and training for all accounting software users
- Reconcile activity fund accounts and prepare monthly reports for board meetings
- Provide fundraising and activity fund transfer information for board approval
- Submit any deposits to the district treasurer for deposit and reporting
- Provide supporting documentation for audits
- Perform other duties as assigned.

**Surety Bonds Treasurer:**

Estimated amount on hand at any one time during the year but not less than \$100,000.

Not greater than required by the county treasurer of the resident county. Function 2313,

Object 525 O.S. § 70-5-115



## **P3 Urban Montessori Encumbrance Clerk**

### **School Background**

P3 Urban Montessori is the first public Montessori to be established in Oklahoma City servicing children from the ages of three to five in the Northeast Oklahoma City area. Our Mission is P3 Urban Montessori seeks to provide a culturally responsive Montessori early childhood education to children in Northeast OKC that fosters autonomous, competent, responsible, adaptive citizens who are lifelong learners, problem solvers committed to uplifting their community.

### **Qualifications should be as follows:**

- Maintain Appropriation and Encumbrance Ledger
- Complete purchase orders
- Determine that encumbrance do not exceed appropriations and are for purpose of appropriation charged
- Transmit warrants to vendor(s)
- Must be a district (school) employee
- Cannot be employed as superintendent, principal, treasurer or assistant treasurer, instructor, or teacher.
- Cannot be a board member
- May serve as minutes clerk
- Perform other duties as the Board or its committees may require

In order to perform duties previously stated the Encumbrance Clerk will need the following documents/forms:

- Supply of approved warrants (blank)
- Supply of approved purchase orders (blank)
- A copy of Estimate of Needs, Cash fund estimate and request for Appropriation, Supplemental estimate, request for approval of State Aid, request for approval of Federal Funds
- Other form necessary to meet the School's requirements

The encumbrance clerk shall complete the following training requirements in accordance with the provisions of 70 O.S. § 5-190: Within nine (9) months after the first day of employment, the encumbrance clerk shall complete at least twelve (12) hours of approved instruction that meets all of the following requirements:

- Any courses or workshops offered for purposes of meeting the requirements of this subsection shall be approved for credit by the State Department of Education Office of Financial Services;

- **The instruction shall address all of the following topics:**

- School finance laws of the State
- Accounting
- Ethics
- Duties and responsibilities of the position
- Any course of instruction or workshop must be approved by the State Department of Education.

- Certificates of completion must be kept on file at the school district.

**Encumbrance Training requirements (new position)**

Within nine (9) months of the first day of employment every encumbrance clerk or treasurer shall complete at least twelve (12) hours of approved instruction that meets all of the requirements.

**Encumbrance clerk continue education includes:**

Complete twelve (12) hours of approved continuing education instruction every three (3) years from the date of initial employment in the position.

**Surety Bonds Encumbrance Clerk:**

Not less than \$1,000.00. Function 2511, Object 525 O.S. § 70-5-119

## **Appendix K Letters of Support and Petition**

### **Signatures**

### 3 Urban Montessori School Petition

**Petition:**

We the undersigned, fully support 3P Urban Montessori School's application to become a public Charter school in Northeast Oklahoma City (Ward 7). We agree to this petition data being used by 3P Urban Montessori to aid in the progression of their Charter application. The provided address data can provide updates on the development and planning process. Any information provided will not be passed to a third party or used for sales purposes.

Name	Residential Address w/zip Code	Phone #	Signature
Varena Davis	Varena Davis	405-816-0319	
Kenneth R. Gribb	5909 N Teary Ave	405-931-8081	KC
Robyne Craig	1101 E Madison	918 360-0126	Re
Wm Thornton	5408 Stonewall Dr.	405-550-0759	(WJ)
Alexis Thyle	2608 N Reeves Ave	405-956-5094	
Christopher Kyle	2300 N. Bath Ave.	405-418-1491	
Michael Williams	872 NE 31st	405-806-8620	Michael Williams
Cynthia Bay	737 Eubank St	(405) 968-1384	Cynthia Bay
Nicole Owens	901 NE 10th St	(405) 848-9980	Nicole Owens
Jean Hill	8400 Ridgeway Rd, 73131	405/524-7322	Jean Hill
Vernon F. Fisher	4115 Park Lane	407	V.F.
Lark Davis	1512 NE 45th	OKC 73111	405-215-2161
Deborah Hawkins	1321 NE 36th	73111	405-424-7595
Corinne Harding	3800 NW 125th St.	OKC, OK 73120	
KENNETH ALFORD	1917 NE 44th	405 588 3471	Kenneth Alford
LOUVENIA MOHAM	6813 N. Lincoln	OKC 731-3924	Louvenia Moham
Robert Whitehead	11407 N. Lincoln	770-530-9292	
Stanley Cole	915 NE 19th	405-651-4752	

### **P<sup>3</sup> Urban Montessori School Petition**

Petition:

We the undersigned, fully support 3P Urban Montessori School's application to become a public Charter school in Northeast Oklahoma City (Ward 5). We agree to this petition data being used by 3P Urdan Montessori to aid in the progression of their Charter application. The provided address data can provide updates on the development and planning process. Any information provided will not be passed to a third party or used for sales purposes.

[illegible]



**State office**

State Senate  
District 48  
State Capitol Room 524  
2300 N. Lincoln Blvd.  
Oklahoma City, OK 73105  
Office 405-521-5531  
[george.young@oksenate.gov](mailto:george.young@oksenate.gov)

Chief of Operations  
Tanisha Woods, MSHRM



State of Oklahoma  
**Senate**

**Committees**

Agriculture & Rural Affairs Committee  
Business & Commerce Committee  
General Government Committee  
Health & Human Services Committee  
Public Safety & Judiciary Committee

**Senator George E. Young, Sr., D. Min.**

August 21, 2023

Dear Board Members of Legacy Learning,

As Senator of district 48, it is my pleasure to offer my full support to the establishment of a 3yr old to Kindergarten Montessori in northeast OKC. I am familiar with the members of the Board who are seeking to establish this school and have no doubt that this will be a successful venture.

The need for innovative instruction for children within the district I serve is great. The families and communities at large can benefit from an infusion of innovation. It is my assertion that providing an early learning environment that utilizes the Montessori method will prepare these children for successful matriculation throughout their school career.

Without question, early educational enhancement is needed across the district and state. I believe wholeheartedly that this development will increase visibility and structure resulting in overarching support, not only from those parents whose children benefit but, from other aspiring entities; inspiring them to follow this blueprint.

Your careful consideration of this endeavor is most appreciated. If there are more questions or discussion desired, please contact my office.

Sincerely,

A handwritten signature in black ink, appearing to read "Dr. E. Young".

Senator Dr. George E. Young, Sr.



August 21, 2023

Legacy Learning  
c/o Board of Directors  
PO Box 16066  
Oklahoma City, OK 73113

Good afternoon to the members of the Board,

I am pleased and excited to give my endorsement to your formation of an early childhood center specializing in the utilization of the Montessori method. Filling this void for families with young children in our community is necessary for continued economic growth and development in Northeast Oklahoma City.

As a long time business owner based in Northeast Oklahoma City, I'm looking forward to seeing the work of this dynamic Board and excited for what it means for the children and families that will be associated with it.

This venture is necessary and celebrated in our community.

Sincerely,

Kevin S. Perry, President



Kim Garrett-Funk, LMSW, NACP

August 22, 2023

Legacy Learning Board  
[legacylearningok@gmail.com](mailto:legacylearningok@gmail.com)

Re: Montessori application

Dear Legacy Learning Board,

As a parent of children who have gone through the Montessori curriculum, I know firsthand the quality of instruction that this model provides. The Montessori educational method, which involves children's natural interests and activities with an emphasis on hands-on learning and developing real-world skills, has been both advantageous and enjoyable for my own children.

When I was approached by Legacy Learning as a sponsor for a new 3yr old-KDG public Montessori school, I was so excited! My children have benefited greatly from their Montessori experience and I am elated that there will be the opportunity to offer this to the families in the northeast community of Oklahoma City.

As an advocate for families in OKC, I also understand the need for quality, year-around childcare and education. I absolutely support this project, as this community is deserving. I am excited for the work of this dynamic Board and am confident that they will have success. Legacy Learning has my whole-hearted, full support.

Sincerely,



Kim Garrett-Funk

Cell: 775.772.1310 | Email: [kimginokc@gmail.com](mailto:kimginokc@gmail.com)

Andrea Grayson  
City of Oklahoma City  
200 N. Walker Avenue  
Oklahoma City, OK 73102  
andrea.grayson@okc.gov

August 22, 2023

Dear Board Members of Legacy Learning,

I am delighted to give my endorsement to your formation of an early childhood center specializing in the use of the Montessori method. I believe the core principles of the Montessori method will help set a solid foundation for young children in our community.

As an employee of the City of Oklahoma City managing the enhancement of law enforcement policies and practices, I truly believe this center will have a tremendous impact on the children and families associated with it. Oklahoma City seeks to prepare the next generation of residents that will reimagine public safety in our community. I look forward to the positive impact and influence this program will have in northeast OKC.

Sincerely,

Andrea Grayson  
Implementation Manager  
City Manager's Office  
(405) 297-2802

Representative Jason Lowe, Esq.  
House District 97  
Proudly serving:  
Oklahoma County



**Committee Member:**  
Energy and Natural Resources  
Judiciary – Criminal  
Public Safety

August 21, 2023

Dear Legacy Learning Board Members,

Upon receiving the word that there was the potential of a new early childhood Montessori school to open in northeast OKC, I was immediately excited. I understand the need for quality early childhood learning in our community and welcome the opportunity to support it.

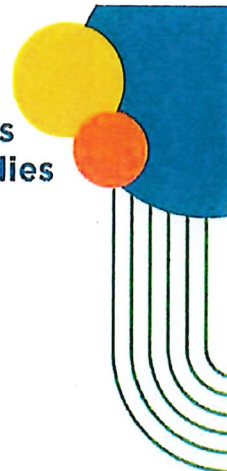
As we continue to develop northeast OKC to meet the needs of our growing community, the addition of an early learning center that services children year round will be a great selling point for future parents and residents. It is my pleasure to submit my support for this worthy venture in our community.

A handwritten signature in cursive script that reads "Jason Lowe".

Representative Jason Lowe, Esq., House District 97



Building **BRIGHTER** Futures  
with All Children and Families



*President*  
Peggy Burris

*President Elect*  
Evan Walter

*Secretary*  
Dr. Robert G. Wood

*Treasurer*  
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Vanessa Morrison  
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David Parker  
Dr. Jeddiah Perdue  
Becky Roten  
Todd Sanders  
Marnie Taylor  
Alex Towler-Bliss, Esq.  
Tony Welch

*Chief Executive Officer*  
Sarah Rahhal

August 22, 2023

Legacy Learning Board  
PO Box 16066  
Oklahoma City, OK 73113

Dear Board members,

Oklahoma City has a complex history, that over time left the children and families in the northeast communities of the city without a lot of what most communities take for granted. Grocery stores, safe recreation areas, local access to mental health services, and high-quality education to name a few.

As Sunbeam Family Services continues its commitment to meeting some of these needs, we offer our full support for a Montessori educational option for families in the northeast OKC area. This high-quality educational model will increase the options for families, and provide positive outcomes for children.

As we continue to redefine our world post-pandemic, the value of high-quality education remains out of reach for more families than ever before. We also support a solution to providing a Montessori education free of charge, in hopes that all children and families can benefit from this wonderful opportunity.

Sunbeam will be happy to partner with and support this effort in the future.

Sincerely,

Paula Gates

Chief Program Officer



1100 NW 14th Street, OKC, OK 73106  
(405) 528-7721 | [sunbeamfamilyservices.org](http://sunbeamfamilyservices.org)



## **Appendix L Training Certificate**



# Office of State Superintendent State of Oklahoma

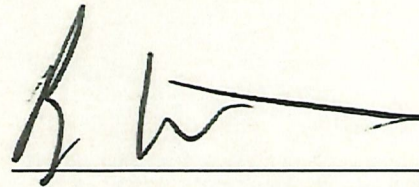
THE STATE SUPERINTENDENT OF PUBLIC INSTRUCTION  
RECOGNIZES AND APPLAUDS

ROSALYN ROBINSON

UPON SUCCESSFUL COMPLETION OF CHARTER SCHOOL TRAINING FOR EXEMPLIFIED  
EXCELLENCE AND COMMITMENT TO ACADEMIC ACHIEVEMENT AND STUDENT SUCCESS, AND  
SERVES AS A MODEL FOR QUALITY VALUES AND ESTEEMED CHARACTER IN OUR COMMUNITY  
AND THROUGHOUT THE GREAT STATE OF OKLAHOMA.

AUGUST 31, 2023

DATE



RYAN WALTERS  
STATE SUPERINTENDENT of PUBLIC INSTRUCTION